

CA4NV  
HAPL  
-1965C21

Government  
Publications

TORONTO

C5-122



City of Halifax

# CENTRAL BUSINESS DISTRICT Economic Analysis for Re-development Planning

for: The City of Halifax

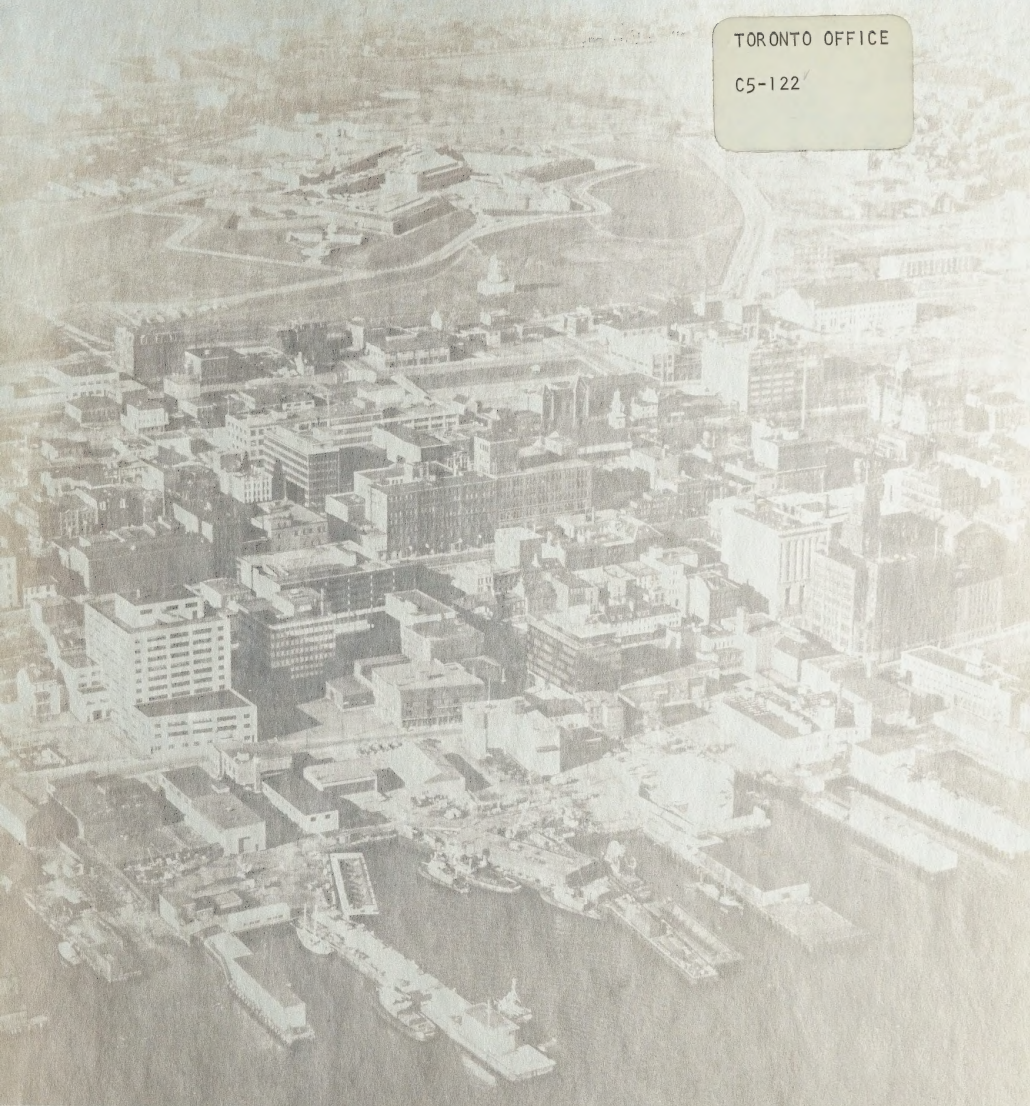
CANADIAN URBAN ECONOMICS LIMITED

OPH  
65









TORONTO OFFICE

C5-122

**City of Halifax**

**CENTRAL BUSINESS DISTRICT**  
**Economic Analysis for Re-development Planning**

prepared for **The City of Halifax**

*This volume was donated to  
the University of Toronto by  
Derek J.W. Little  
President, Municipal Planning  
Consultants Co. Ltd.*



# CANADIAN URBAN ECONOMICS LIMITED

A DIVISION OF LARRY SMITH & COMPANY

SUITE 1804, 8 KING STREET EAST, TORONTO 1, ONTARIO • PHONE 362-5055

June 30, 1965



His Worship, The Mayor of Halifax  
City Hall  
Halifax, Nova Scotia

Sir:

In accordance with the provisions of the contract entered into by the City of Halifax and the undersigned company, we respectfully submit herewith twenty copies of our report entitled City of Halifax Central Business District, Economic Analysis for Re-development Planning.

In the first part of the report, we have summarized, for purposes of convenience, the findings and recommendations which are contained in the main body of the report. Part II presents an analysis of population trends and contains our population projections for the Halifax metropolitan area. In Part III of the report, the space or unit requirements of suitable land uses have been analyzed and space or unit projections have been made for the Halifax metropolitan area and the City of Halifax central business district.

It is our understanding that, following our submission of this report, the Draft Master Plan for the City of Halifax central business district will be revised and amended as necessary and will then be delivered to us in order to enable us to perform the work set out in Phase II (Redevelopment Planning and Implementation) of our proposal of November 26, 1964.

We appreciate that it may take some days for the joint committee to review the report and the findings and recommendations contained therein. In the event that any questions arise with respect to the report, we would suggest that the same be transmitted to us either by telephone or in writing once the report has been



Digitized by the Internet Archive  
in 2022 with funding from  
University of Toronto

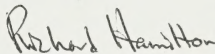


The Mayor of Halifax  
June 30, 1965  
page 2

fully reviewed. We will then either return to Halifax for additional discussions or answer such questions by way of supplementary memorandum.

Yours very truly,

CANADIAN URBAN ECONOMICS LIMITED

A handwritten signature in dark ink, appearing to read "Richard Hamilton". The script is cursive and somewhat stylized, with the first name "Richard" being more prominent than the last name "Hamilton".

Richard Hamilton

las

C5-122

Enclosures





CITY OF HALIFAX  
CENTRAL BUSINESS DISTRICT  
ECONOMIC ANALYSIS FOR  
REDEVELOPMENT PLANNING

Prepared for  
The City of Halifax

June 30, 1965

Canadian Urban Economics Limited  
(A Division of Larry Smith & Company)  
Room 1804, 8 King Street East  
Toronto, Ontario





## TABLE OF CONTENTS

	<u>Page</u>
INTRODUCTION . . . . .	i
<hr/>	
PART I - SUMMARY OF FINDINGS AND RECOMMENDATIONS	
Summary of Findings and Recommendations. . . . .	1
<hr/>	
PART II - POPULATION, LABOUR FORCE, & THE ECONOMIC BASE	
Section I - Population . . . . .	11
Section II - Labour Force and the Economic Base . . . . .	19
Section III - Halifax CMA Population Projections - 1966-1986 . .	30
<hr/>	
PART III - HALIFAX CENTRAL BUSINESS DISTRICT LAND-USE REQUIREMENTS	
Introduction . . . . .	32
Section I - Residential. . . . .	35
Section II - Retail Trade . . . . .	43
Section III - Office Space . . . . .	56
Section IV - Transient Housing. . . . .	64
Section V - Other Land Uses. . . . .	69
<hr/>	
APPENDICES	
Appendix A - Retail Customer Surveys. . . . .	A-1
Appendix B - Supplementary Tables . . . . .	B-1





## INTRODUCTION

The following report has been prepared for the City of Halifax in order to provide a sound economic framework against which the general planning concepts contained in the City of Halifax central business district Draft Development Plan of June, 1964, can be tested, altered, and amended as necessary and on the basis of which a formal program of redevelopment and rehabilitation can be prepared for the City of Halifax central business district.

The report, which covers the period from 1966 to 1986, provides broad estimates of selected future land-use requirements for the Halifax census metropolitan area in general and, within this framework, presents the probable range of opportunity for selected land uses within the Halifax central business district in particular. These estimates have been developed primarily on the basis of the character and extent of projected increases in population, having regard to the probable rate of expansion of the regional economic base. Generally, the existing space- or unit-to-population ratios in the various land uses have been calculated; and, based upon our experience in other areas, these ratios have then been adjusted where necessary and applied to projected population levels in order to provide an estimate of future space or unit requirements. In this connection, it should also be noted that additional space or unit requirements for both the Halifax census metropolitan area and the City of Halifax central business district have been expressed cumulatively commencing with the year 1966. In every instance, the cumulative additional space or unit requirements which we have projected must be reduced by the amount of additional space developed from time to time since the inventory figure which has been employed in each particular land use was taken. For example, in the residential section of the report, we have employed 1961 inventory data and have projected that the Halifax metropolitan area will require some 10,000 additional dwelling units by 1966. In the period 1961-1964, approximately 5,700 new dwelling units were developed within the Halifax metropolitan area. The additional dwelling unit requirements to the year 1966 were therefore effectively reduced to approximately 4,300 additional dwelling units by the end of 1964.

The projections of land-use requirements are intended as guides for redevelopment planning and indicators of potential future growth within the Halifax central business district and not as limits of opportunity. The objectives and success of redevelopment action, as well as the economic growth achieved in the Halifax area, are major factors which will substantially affect the extent to which these land-use projections are realized. It should also be noted that, although levels of future land-use requirements are keyed to selected future years, the basis of these projections is, in most cases, directly related to population totals in the area. The extent to which the population levels are reached in the indicated years will be the principal determinant of additional land-use needs for the entire community.



Under the circumstances, the study which follows is not intended as a final reference work but rather as a working guide for use by the City of Halifax. It should be reviewed from time to time and updated to reflect unforeseen fluctuations in the economy and the rapidity or slowness with which economic change occurs. Utilized in this manner, the report should assist the city in planning for the accommodation of the various space or unit requirements which have been projected for the Halifax central business district during the period to 1986.

The analyses contained in this report have been developed from the best currently available data. We have relied heavily upon land-use inventory information contained in the central business district Draft Development Plan which was prepared by the City of Halifax Planning Department in 1964 and upon the supplementary land-use information which has been supplied to us by the City of Halifax Planning Department from time to time. In addition, an inventory of the major retail space within the Halifax census metropolitan area was conducted by Canadian Urban Economics, <sup>limited</sup> in March, 1965, specifically for use in preparation of this report. The principal source of general statistical data has been the Dominion Bureau of Statistics (hereinafter referred to as DBS) Census material which has been prepared from the 1961 Canadian Census.

It should be noted that, due to minor shrinkage which occurs in production of the overlays which are used on the various maps contained in this report, the locations of the developments which are indicated on the overlays are not necessarily precisely correct. The maps and overlays should therefore be examined with this reservation in mind.

### Geographic Definitions

A number of technical phrases and abbreviations are used throughout the report to indicate specific areas which are under consideration. Because of the similarity of the abbreviations, confusion may arise unless a clear understanding is maintained of the precise areas referred to. The technical phrases and abbreviations which we have used are defined as follows:

1. Halifax census metropolitan area. This area, which is also referred to as the Halifax CMA and the CMA, comprises the cities of Halifax, and Dartmouth and the suburban areas of Herring Cove, Spryfield, Armdale, Rockingham, Bedford, Waverly, North Dartmouth, Cole Harbour, and Eastern Passage. The definition, therefore, includes all of the urban and suburban areas which are normally thought of as the Halifax metropolitan area as well as some fringe rural lands.
2. Halifax central business district. This area, which is also referred to as the Halifax CBD and the CBD, was defined by the City of Halifax Planning Department. It includes basically that part of the City of Halifax which lies south of Proctor Street, east of Citadel Hill,





and north of the Ocean Terminals and the CNR railway station. Its eastern boundary is defined as the Waterfront. This area, which contains approximately 181 acres, is the area with which our report is principally concerned.

3. The Halifax CBD core. This area, which is also referred to as the CBD core and the core of the CBD, contains the main concentration of office and commercial uses within the Halifax CBD. The area is defined by the City of Halifax Planning Department as extending from Buckingham Street to Spring Garden Road between Grafton Street and Water Street.
4. Halifax CBD and fringe area. Because the boundaries of the CBD as outlined above are somewhat arbitrary, we have also referred to the CBD and fringe area in this report. The fringe area, while not amenable to precise definition, includes that part of the City of Halifax which is adjacent to and within relatively easy walking distance of the central business district. It would encompass generally the area which is east of North Park and South Park Streets between Cunard Street and South Street.

The boundaries of the areas which have been defined above are generally established on the basis of the type of activity being carried on within the area at the time that the definition is made. To this extent, none of the areas is firmly fixed or established. The CBD core, for example, may expand over the years as the concentration of office and commercial uses extends into other areas of the CBD. Similarly, the CMA may be redefined at some point in the future if substantial suburban development spills across its boundaries into adjacent parts of Halifax County.

#### Basic Assumptions

It is always necessary to make certain broad assumptions when making long-range forecasts. The major assumptions underlying the growth projections which have been made in this report are as follows:

1. The City of Halifax, the Halifax metropolitan area, and the nation as a whole will not suffer any major economic decline during the time span covered by this report; and income levels as well as purchasing power will remain steady or will rise to some extent.
2. Canada will not become involved in or be affected by any major war or national disaster.
3. The population increases within the Halifax CMA projected for the future period over the current population level will occur approximately as forecast.



4. In the course of this analysis, considerable research was undertaken in published statistical data (sources of which are specifically identified in the text and tables) and in the field by representatives of Canadian Urban Economics<sup>Limited</sup>. In some instances, estimates and statistical data processed by others were adopted. The data used herein are believed to be sufficiently correct to be reasonably useful for planning purposes.
5. All current dollar figures and corresponding sales and volume estimates are based upon the present level of purchasing power and value of the dollar. Sales projections (unless otherwise indicated) have been developed on the basis of an expected rise in purchasing power and dollar value.
6. The projected future land-use demands are intended for use in the planning process. Inasmuch as the realization of these demand levels will be, in large part, dependent upon the plans and programs adopted by the City of Halifax and its leaders, these demand figures are not intended to be forecasts of what will be developed in the Halifax CBD in any given year but rather what can be reasonably anticipated from an economic standpoint.
7. The current relationship between individual land uses and the population level will remain approximately the same over the projected period with reference to both local and national experience since the current land-use population relationships reflected in the Halifax CMA and several other metropolitan areas provided one of the primary bases for projecting the land-use requirements presented in this report.
8. Since the estimates of future land-use demand were generally related to the existing land-use inventory, any change in this inventory by demolition or change in use will reflect an additional measurement of demand (replacement demand) to the extent of the change experienced. This replacement demand will be in addition to the demand levels determined for projected population increases alone.

#### Acknowledgements

Canadian Urban Economics<sup>Limited</sup> wishes to acknowledge the assistance and cooperation of the City of Halifax Planning Department in assembling the basic land-use inventory data which have been used in this report. In addition, credit must be given to the various organizations and individuals who cooperated in providing information and assistance in the development of this study and to the several authors who have written about the Halifax area, Nova Scotia, and the Atlantic Region whose works have contributed to the opinions and judgments reflected in this analysis. Reference to these works and sources is made at the appropriate places throughout the text.





PART I

SUMMARY OF FINDINGS AND RECOMMENDATIONS



## SUMMARY OF FINDINGS & RECOMMENDATIONS

### Population, Labour Force, and the Economic Base

The Halifax CMA has exhibited a fairly constant population relationship to Canada as a whole, since the beginning of this century. Halifax CMA population represented 0.9% of the Canadian population in 1901 and has not dropped to less than 0.8% nor exceeded 1.0% of the Canadian population since that time. In 1951, 1956 and 1961, the Halifax CMA population represented approximately 1.0% of the population of Canada.

While the relationship of the population of the Halifax CMA to the population of the Atlantic Provinces has not been constant, it has consistently increased its percentage share of the Atlantic Provinces population, reflecting the more rapid population growth which has occurred in the Halifax area. Since 1941, the Halifax CMA has increased its share of the Atlantic Provinces population at a rate of 1.4% per decade, although this rate of increase slowed considerably during the period 1956 to 1961.

Assuming a continuation of the current relationship between the population of the Halifax CMA and the population of Canada and the Atlantic Provinces and employing independent population projections which have been made for Canada and the Atlantic Provinces, it would appear that the population of the Halifax CMA might be expected to range between 290,000 and 355,500 in 1985.

To a large extent, population growth will be dependent upon the expansion of employment opportunities within the Halifax CMA. An examination of the economy of the Halifax area reveals that the defence sector of the economy employs almost one-quarter of the total labour force in the Halifax CMA and that during the period 1951 to 1961, approximately 38% of the total labour force increase for the Halifax CMA was attributable to increases in the defence sector. This report has assumed that the defence sector will stabilize at approximately the 1961 level. Under the circumstances no labour force increases are projected for the defence sector in future years.

Speaking in general terms, the other sectors of the economy grew steadily during the period 1951 to 1961, with emphasis on the various service industries (health, government, education, personal, and business services). Analysis of the manufacturing sector of the economy indicates that the Halifax area continues to be relatively weak in this sector; however, specific growth and potential growth areas can be identified. There are indications that, with the help of agencies like Industrial Estates Ltd., Nova Scotia generally and the Halifax area in particular are overcoming their historical difficulties in attracting secondary industries.

The review of growth patterns within the economy would indicate that the Halifax CMA should plan for a labour force growth averaging approximately 3% per year on the 1961 labour force base during the period to 1986. Assuming that the labour force will remain relatively constant at







# HALIFAX CBD

## SUMMARY OF ADDITIONAL LAND-USE DEMAND - 1966-1986

	Cumulative Additional Demand				
	<u>1966</u>	<u>1971</u>	<u>1976</u>	<u>1981</u>	<u>1986</u>
Apartment Units	1,271	2,173	3,050	4,289	5,445
Retail Space (Sq.Ft.)	68,460	170,180	294,250	442,600	612,630
Comparison Goods	25,500	82,300	153,400	238,000	335,000
Convenience Goods	5,250	11,550	19,050	28,000	38,250
Other Retail (Automotive)	28,400	56,400	89,200	129,000	174,600
Service Retail	9,310	19,930	32,600	47,600	64,780
Office Space (Sq.Ft.)	192,270	503,795	976,880	1,429,400	2,078,300
Medical-Dental	2,170	4,795	7,880	11,400	15,300
Nongovernment	135,000	289,000	571,000	792,000	1,167,000
Government	55,100	210,000	398,000	626,000	896,000
Hotel-Motel Units	143	334	528	733	937
Other Land Uses					
Recreational Uses (Theatres)	-	1	2	-	3
Parking Spaces	2,437	3,263	4,457	5,659	7,297
Institutional Uses*					

\* While space requirements have not been identified, the need for new courthouse and land registry facilities and a new Maritime museum has been identified. In addition, the aquarium which has been selected as the City's Centennial project will require a location. The report also suggests possible future demand for an art gallery and civic auditorium.

approximately 40% of the Halifax CMA population, an average 3% per year labour force growth rate would indicate the following probable population levels for the Halifax CMA:

Halifax CMA 1961 - 1986

Population Projections

	<u>1961</u>	<u>1966</u>	<u>1971</u>	<u>1976</u>	<u>1981</u>	<u>1986</u>
Population	183,900	205,500	229,500	257,500	290,000	326,000

Land Use Demand Summary

The table on the opposite page presents in summary form the cumulative additional space required in the Halifax CBD to the year 1986 to accommodate the demand which has been identified in selected land uses. These projections are intended to indicate a range of opportunities for both physical expansion and real estate investment as a basis for formulating a program of downtown redevelopment and revitalization. Summary comments on the key factors affecting the potential expansion of the selected land uses in the Halifax CBD are made below.

Residential. The 1961 Census of Housing by DBS showed that the Halifax CMA contained 42,366 occupied dwelling units in that year. Of this total number of dwelling units, 14,880 units or 35.1% were apartments and duplexes rather than single-family dwellings. Between 1958 and 1964, there has been a marked increase in the relative importance of apartment construction in the Halifax CMA.

Assuming that the number of persons per occupied dwelling unit will continue to decline during the period covered by our projections and allowing for a continuing 5% dwelling unit vacancy factor and for a replacement of the 1961 inventory at approximately 2% per year, total additional dwelling unit requirements for the Halifax CMA (over and above the existing dwelling unit inventory) have been projected on the basis of estimated future Halifax CMA population levels as follows:

Halifax CMA 1966 - 1986

Additional Cumulative Dwelling Unit Requirements

	<u>1966</u>	<u>1971</u>	<u>1976</u>	<u>1981</u>	<u>1986</u>
Cumulative Number of Additional Units Required	10,169	17,882	24,400	34,318	43,561





On the basis of established trends, it is reasonable to anticipate that approximately 50% of the additional dwelling units to be constructed in the Halifax CMA will be apartment and row housing units rather than detached or semi-detached dwelling units. The probable Halifax CMA apartment and row housing requirements will therefore be as follows:

Halifax CMA 1966 - 1986

Additional Cumulative Apartment and Row  
Housing Requirements

	<u>1966</u>	<u>1971</u>	<u>1976</u>	<u>1981</u>	<u>1986</u>
Cumulative Number of Additional Units Required	5,084	8,691	12,200	17,159	21,780

Having regard to the high land values typically generated by CBD land uses, it is our opinion that the only residential developments feasible for the Halifax CBD would be of the apartment or row housing type.

There appears to be a need for additional apartment housing near the central business district for the middle- and lower-middle income group in particular. This centrally located housing would offer the following advantages over suburban housing developments:

1. Proximity to downtown activity.
2. Convenience for those without automobile transportation.
3. Services which can be offered in multiple family housing.
4. Proximity to universities and hospitals.

While some demand should be anticipated from families with children, people without children who either work in the downtown area or are retired constitute the major source of demand for this type of close-in accommodation.

It would be our opinion that sufficient demand for Halifax CBD and fringe area residential accommodation will exist in future years that approximately 25% of the total Halifax CMA additional apartment and row housing units could be developed within the Halifax CBD and fringe area. On this basis, Halifax CBD and fringe area cumulative additional unit requirements would be as follows:



### Halifax CBD 1966-1986

#### Additional Cumulative Apartment and Row Housing Requirements

	<u>1966</u>	<u>1971</u>	<u>1976</u>	<u>1981</u>	<u>1986</u>
Cumulative Number Additional Units Required	1,271	2,173	3,050	4,289	5,445

Retail. Significant changes have occurred in the distribution of major retail space within the Halifax CMA since the late 1950's. The Halifax CMA, like most major metropolitan areas in North America, has been subject to the fairly rapid development of suburban shopping centres. Of greater significance than this general trend has been the emergence of the northwest area of the City of Halifax as the focal point for retail comparison goods\* for the Halifax CMA. The combined attraction of the Simpsons-Sears complex, the Halifax Shopping Centre, and the Bayers Road Shopping Centre, together with the relative ease of access to the northwest area from all parts of the Halifax CMA, have contributed to the present dominance of this area from a retail standpoint.

Increasing Halifax CMA population, together with the steady rise which is anticipated for per capita disposable incomes, would indicate that total retail sales in the Halifax CMA will more than double in the period that is covered by our projections:

### Halifax CMA 1961-1986

#### Projected Total Retail Volume Potential (000's)

	<u>1961</u>	<u>1966</u>	<u>1971</u>	<u>1976</u>	<u>1981</u>	<u>1986</u>
Estimated Total Re- tail Sales Potential	\$199,774.5	\$234,270.0	\$274,252.5	\$321,617.5	\$377,870.0	\$442,708.0

However, these projections of total retail sales potential include retail sales of every kind. In an analysis of the future role of the Halifax CBD retail facilities, it is the comparison goods sales potential\* which is of

\* Comparison goods is generally defined as the type of merchandise normally carried by department stores, variety stores, apparel, dry goods, furniture, and specialty stores. This category generally includes all retail stores which market the type of merchandise for which customers will typically travel the greatest distances in order to shop and compare price, quality, and style of merchandise before selecting an item to be purchased.





HALIFAX CMA - 1966-1986

CUMULATIVE ADDITIONAL COMPARISON GOODS SPACE REQUIREMENTS  
(000's of Square Feet)

	<u>1966</u>	<u>1971</u>	<u>1976</u>	<u>1981</u>	<u>1986</u>
Total Cumulative Comparison Goods Space Requirements	1,762.0	2,065.5	2,421.5	2,843.3	3,328.1
Estimated 1965 Comparison Goods Inventory	<u>1,654.3</u>	<u>1,654.3</u>	<u>1,654.3</u>	<u>1,654.3</u>	<u>1,654.3</u>
Total Cumulative Additional Compari- son Goods Space Re- quirements	<u>127.8*</u>	<u>411.2</u>	<u>767.2</u>	<u>1,189.0</u>	<u>1,673.8</u>

---

\* Does not derive from totals due to actual space requirements for specific store types within the broad category - a more detailed table is contained in the main text.



primary importance since the type of retail outlet included within this category constitutes the real core and most significant content of any major retail area. It is estimated that the following potential will exist in the Halifax CMA for comparison goods during the period covered by our projections:

Halifax CMA 1966-1986

Projected Retail Comparison Goods Volume Potential  
(000's)

	<u>1966</u>	<u>1971</u>	<u>1976</u>	<u>1981</u>	<u>1986</u>
Estimated Retail Comparison Goods Sales Potential	\$78,706.5	\$92,259.0	\$108,150.0	\$127,020.0	\$148,656.0

By estimating average per square foot sales levels for the various retail store types, it is possible to convert estimates of volume potential into estimates of retail space requirements. In the table opposite, the total cumulative retail comparison goods space requirements are set out together with the estimated 1965 comparison goods inventory for the Halifax CMA. By subtracting the current inventory from the total projected comparison goods space requirements, the table indicates the cumulative additional comparison goods space which it is estimated will be required in the Halifax CMA during the period covered by our projections.

Within the context of the estimated total additional Halifax CMA comparison goods space requirements, it would be our opinion that insufficient potential exists for a major development of retail comparison goods space within the Halifax CBD. Even if it is assumed that the Halifax CBD could develop as much as 40% of the estimated total additional comparison goods space requirements for the Halifax CMA (a percentage share which we believe to be unrealistically high), the amount of additional comparison goods space developed within the Halifax CBD would not restore the retail regional dominance of the CBD.

If we accept the fact that the Halifax CBD cannot recapture a position of retail regional dominance, what does the future hold for retail merchants who are currently located within the CBD? The answer to this question depends largely upon the course of action followed by the City of Halifax and the downtown merchants themselves. The principal source of customers for the Halifax CBD retail merchant is the residential population which lives south of Young Street and east of Connaught Avenue and the working population which is employed within the downtown area. Substantial increases in future years are possible in both of these population groups. We have projected a continuing demand for multifamily accommodation in the Halifax CBD and fringe area, while in the following commentary we have estimated that office accommodation within the Halifax CBD can be doubled within the next twenty years.



These projected increases are unlikely to occur unless a positive programme of redevelopment and rehabilitation is undertaken within the Halifax CBD and solutions are developed to the problems of access and parking. Without positive action, new office developments may well be located out of the CBD while residential developers will typically be reluctant to risk apartment developments in an area where the future seems uncertain.

If, as a result of inaction, these two population groups do not increase within the Halifax CBD and fringe, the average CBD retail merchant can look forward to a future in which he will be unlikely to more than maintain his current sales volumes. If, on the other hand, as a result of positive action, these population groups are substantially increased in the years ahead, a proportionate increase can be anticipated in sales potential for the CBD retail merchants. It will then be up to the downtown retail merchants themselves to convert this expanded sales potential into increasing retail sales volumes by aggressive and competitive merchandising techniques and by investment in physical improvement to retailing facilities within the CBD. Providing that positive programmes are undertaken by both the City of Halifax and the merchants themselves, it would be our opinion that the Halifax CBD, without any major new retail development, should be able to attract the following additional retail sales volumes in the years ahead:

#### Halifax CBD - 1966-1986

##### Cumulative Additional Retail Sales Volumes (000's)

	<u>1966</u>	<u>1971</u>	<u>1976</u>	<u>1981</u>	<u>1986</u>
Comparison Goods	\$1,147.5	\$3,703.5	\$ 6,903.0	\$10,710.0	\$15,075.0
Total Retail	\$3,917.9	\$9,383.8	\$16,013.7	\$23,953.0	\$33,051.8

At average operating levels, the increasing sales volumes outlined in the table above would support the following additional retail space within the Halifax CBD during the period covered by our projections.

#### Halifax CBD - 1966-1986

##### Cumulative Additional Retail Space Requirements (Sq.Ft.)

	<u>1966</u>	<u>1971</u>	<u>1976</u>	<u>1981</u>	<u>1986</u>
Comparison Goods	25,000	82,300	163,400	238,000	335,000
Total Retail	68,460	170,180	294,250	442,600	612,630

As part of a major complex along the lines of the relatively massive development which was planned for the Cornwallis Centre, a significant amount of retail space might perhaps attract a large enough share of total CMA retail



volume potential to be successful from an economic standpoint. However, it is our opinion that a very real possibility would exist that a multiuse development of this kind within the Halifax CBD would tend to overwhelm the other facilities within the CBD and that the balance of the CBD would therefore tend to deteriorate. We believe that a dominant retail role is not vital to the continuing health of the CBD. Under the circumstances, the risks inherent in a large-scale self-contained complex within the CBD far outweigh the possible advantages which might accrue to the city from such a development.

Office Space. The Halifax CBD has held a strongly dominant position with respect to office space. Of the total estimated CMA inventory of 2,373,200 square feet of office space, it is estimated that only approximately 500,000 square feet has been developed outside the boundaries of the CBD.

Having regard to the future population levels projected for the Halifax CMA and the relatively low volume of nongovernment office space in particular which has been constructed during the past decade, substantial increases in all types of office space have been projected for the Halifax CMA:

#### Halifax CMA 1966-1986

##### Cumulative Additional Office Space Requirements (Sq.Ft.)

	<u>1966</u>	<u>1971</u>	<u>1976</u>	<u>1981</u>	<u>1986</u>
Cumulative Additional Office Space Require- ment	252,000	642,350	1,235,000	1,799,200	2,607,600

Because of the absolute dominance of the Halifax CBD with respect to office space, it is reasonable to assume that the area will continue to attract a major share of future office developments since new office space will typically locate convenient to major concentrations of existing space in order to facilitate the face-to-face contact between businessmen which is so much a part of everyday commercial life.

#### Halifax CBD 1966-1986

##### Cumulative Additional Office Space Requirements (Sq.Ft.)

	<u>1966</u>	<u>1971</u>	<u>1976</u>	<u>1981</u>	<u>1986</u>
Cumulative Additional Office Space Require- ment	192,270	503,795	976,880	1,429,400	2,078,300

It should be stressed that it is the absolute dominance of the Halifax CBD as far as office space is concerned which provides the real commercial strength





for the CBD. Assuming that the additional office space requirements estimated in the table preceding are in fact located within the Halifax CBD during the years ahead, there is every reason to anticipate that the existing regional dominance of the Halifax CBD will be maintained.

Hotel and Motor Hotel Space - Major competitive hotel and motor hotel facilities in the Halifax CMA are presently located either within the Halifax CBD itself or on the western fringe of the CBD (the Lord Nelson Hotel and the Dresden Arms motor hotel), although a new motor hotel is currently under construction in the City of Dartmouth (the Holiday Inn). In addition to hotel and motor hotel facilities, a large number of motels is located in the suburban areas adjacent to the cities of Halifax and Dartmouth and along the west side of the Bedford Basin. When the Holiday Inn is completed and the extension to the Dresden Arms has been constructed, competitive transient housing accommodation in the Halifax CMA will be in the neighbourhood of 1,047 rooms. Operators of the major hotels and motor hotels indicated that occupancy levels had generally been maintained at 60% to 65% with peak demand occurring during the summer months and during conventions.

Demand for transient housing accommodation comes from a variety of sources, the principal segments of which are: transients attending meetings and conventions, business travellers, and tourists. An examination of recent statistics covering tourist and convention traffic in the Halifax CMA indicates that tourist traffic has increased steadily in recent years. The director of the Halifax Tourist and Convention Bureau estimated 1964 tourist traffic in the Halifax area at a minimum of 183,000 persons. The convention business shows only moderate increases in recent years due in part to the fact that present competitive transient housing facilities within the Halifax CMA are taxed to the limit by the larger conventions. Because of the regional dominance of the Halifax CMA, business-connected travel constitutes a major source of continuing demand for transient housing accommodation.

It is anticipated that each of the above-mentioned sources of transient housing demand will increase steadily in future years and that, as a result, additional transient housing accommodation will be required within the Halifax CMA. The potential for additional transient accommodation within the Halifax CMA has been estimated as follows:

#### Halifax CMA 1966-1986

<u>Cumulative Additional Transient Housing Requirements</u> (Number of Rooms)					
	<u>1966</u>	<u>1971</u>	<u>1976</u>	<u>1981</u>	<u>1986</u>
Cumulative Additional Number of Rooms	186	445	755	1,028	1,561

The Halifax CBD has maintained a strongly dominant position with respect to transient housing accommodation. It is anticipated that this dominance



will continue during the period covered by our projections, although an increasing trend towards development of additional facilities in the City of Dartmouth and the suburbs will probably occur as the metropolitan area increases in size. The estimates of the Halifax CBD share of cumulative additional transient housing requirements reflect this probable trend by reducing the Halifax CBD percentage share of transient housing accommodation from 77% in 1966 to 60% in 1986:

#### Halifax CBD 1966-1986

##### Cumulative Additional Transient Housing Requirements (Number of Rooms)

	<u>1966</u>	<u>1971</u>	<u>1976</u>	<u>1981</u>	<u>1986</u>
Cumulative Additional Number of Rooms	143	334	528	733	937

Other Land Uses. Within this general category are included commercial recreational land uses, institutional land uses, and Halifax CBD automobile parking requirements.

1. Commercial recreational. Consideration of commercial recreational land-use requirements for the Halifax CBD is effectively limited to consideration of the probable future demand for additional theatre units since less intensive land-use recreational facilities like bowling, curling, and billiards are typically unable to support the high land values generated within the CBD. In 1961 there were nine movie theatres within the Halifax CMA with average annual sales per unit in the neighbourhood of \$108,460. By calculating the per capita sales of the theatre industry within the Halifax CMA in 1961 and assuming a continuation of the current pattern of commercial recreational expenditures, we have projected the additional theatre unit requirements (at constant average sales per unit of \$108,500) by adjusting per capita sales levels to reflect anticipated increases in personal disposable income and by applying estimates of future population levels to the adjusted per capita sales levels. Estimated movie theatre unit requirements for the Halifax CMA are as follows:

#### Halifax CMA 1966-1986

##### Cumulative Additional Theatre Requirements

	<u>1966</u>	<u>1971</u>	<u>1976</u>	<u>1981</u>	<u>1986</u>
Additional Unit Requirements (@ Constant Sales/Unit of \$108,500)	1	3	5	7	10

The movie theatre content of the Halifax CBD has been reduced from five to two in recent years although this reduction in entertainment facilities has been somewhat offset by the establishment of permanent repository theatre at the Neptune Theatre. While it is impossible to be definitive about the demand for additional theatre units within the Halifax



CBD, both commercial and cultural entertainment facilities are essential to the CBD if it is to retain vitality in the evening hours after the offices are closed. Under the circumstances, for planning purposes, we have suggested that three additional theatre units might reasonably be anticipated for the Halifax CBD during the period covered by our projections. While we have not attempted in the main body of the report to indicate the years in which demand for additional CBD theatre units may manifest itself, the summary land-use table at the beginning of this part of the report has, for illustrative purposes only, indicated the potential for these additional units in 1971, 1976, and 1986.

2. Institutional. Institutional land-use requirements are generally not susceptible to economic analysis insofar as actual space requirements are concerned. The size of the museums, art gallery, and civic auditorium and the amount of land area which they will occupy are governed generally by the interests and aspirations of the community from time to time. The need for new courthouse and land registry facilities is generally accepted together with the need for a new Maritime museum and a location for the aquarium which has been selected as the Centennial project for the City of Halifax. In addition, we would suggest that thought should be given to possible future locations for an art gallery and a civic auditorium to adequately serve the cultural needs of an expanding population.

All of the institutional land uses discussed above should ideally be located within the CBD where they would strengthen the regional role of the CBD and provide additional balance to the variety of CBD land uses. Development of the public institutional land uses which we have referred to, as well as construction of a new Halifax city hall, provides a major opportunity for planners, by careful grouping and choice of location, to balance and create diversity of land uses in the area adjacent to the CBD core.

3. Parking. The parking facilities currently available in the Halifax CBD are, in our opinion, insufficient to accommodate the existing demand at a reasonably normal ratio of 2 parking spaces per 1,000 square feet of CBD, office, and retail space. Based upon the Halifax CBD Draft Master Plan inventory of CBD office and retail space (2,853,600 square feet), the present parking inventory of 3,792 parking spaces compares with 5,707 parking spaces which are required at normal parking ratios to serve existing CBD, office, and retail space. The summary table at the beginning of this part of the report indicates the cumulative total number of parking spaces required over and above the current inventory, to maintain a ratio of two parking spaces per 1,000 square feet of CBD office and retail space during the period covered by our projections. It should be noted that these cumulative requirements do not include any provision for parking space which may be lost as a result of abolition of on-street parking within the CBD or conversion of CBD land currently used for parking to other uses.



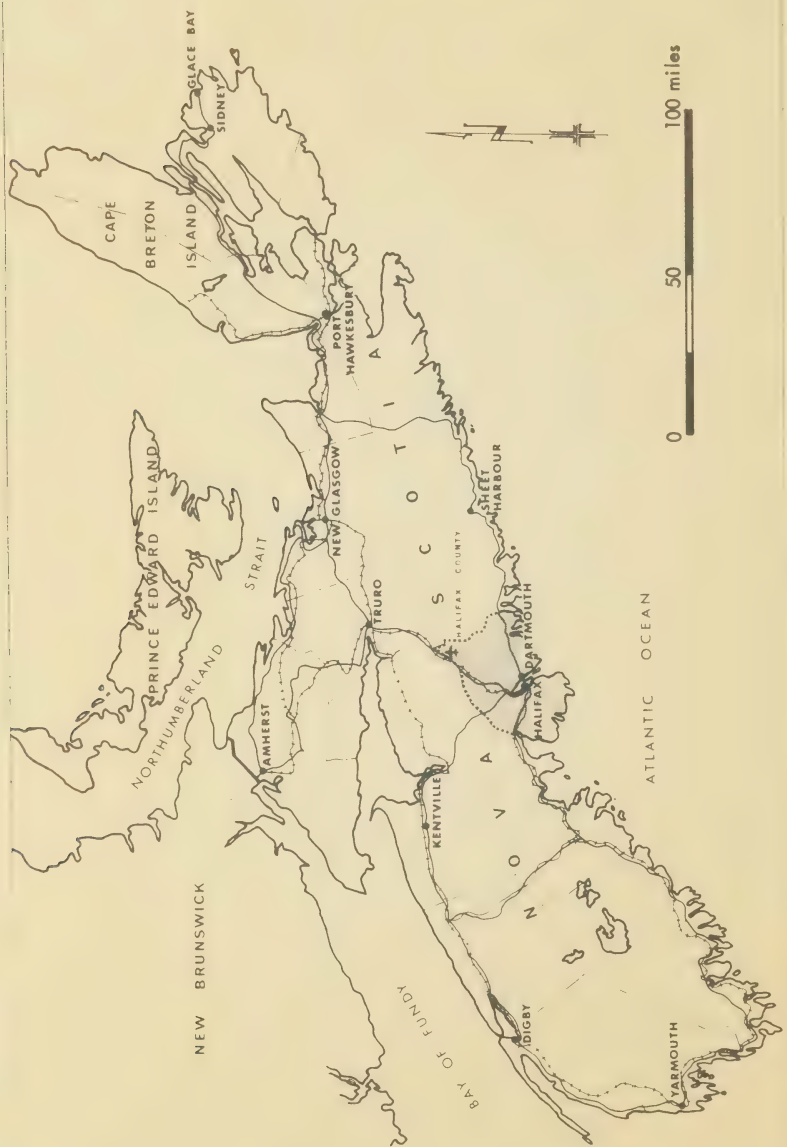


PART II

POPULATION, LABOUR FORCE & THE ECONOMIC BASE







## SECTION I

### POPULATION

#### Introduction

The first part of this report is intended to set the stage for the analysis of the Halifax CMA and the City of Halifax CBD land use requirements contained in the following part of the report. Historical population growth trends are examined for the Halifax CMA, the Province of Nova Scotia, and Atlantic Provinces and Canada; and significant features and trends are discussed. Recent population projections for Canada and the Atlantic Provinces are then examined and used to indicate the range of population possibilities for the Halifax CMA.

Labour force growth in the Halifax CMA during the period 1951 to 1961 is examined. Following this discussion, the composition of the Halifax CMA labour force in 1961 is compared with the Canadian labour force in the same year. Areas of actual and potential growth are identified and the relationship between population and labour force is discussed.

From an examination of these factors as they influence population growth, a population projection for the Halifax CMA is selected as representing, in our opinion, a reasonable estimate of the population growth which the Halifax CMA can expect to support and maintain to the year 1986.

#### A Brief Historical Review

As a result of a decision taken by the British Government in 1748, in the following year an expedition containing the nucleus of permanent settlement under the command of Col., the Honourable Edward Cornwallis landed at Chebucto. This area, which in 1749 adopted the name Halifax, grew rapidly as a result of active and earnest support from the British Government which was endeavoring to offset the numerical advantage of the established Acadian population. By 1752, the population of Halifax as recorded by the first Census was 5,134. The settlement grew steadily to approximately 9,000 persons in 1800 and 11,000 persons in 1812.

With the end of the War of 1812 and of the Napoleonic Wars a few years later, the Halifax area entered a prolonged period of depression. The naval forces which had been based in Halifax were largely withdrawn, trade with the United States diminished, and in 1833 the slave trade in the West Indies was finally abolished. An improvement in economic conditions for Halifax was heralded by the signing of the contract in 1839 between Samuel Cunard of Halifax and the British Government for a regular steamship mail service between England and North America. World events created a shortage of shipping which









LEGEND	
1	HALIFAX CITY
2	DARTMOUTH CITY
3	BEDFORD CITY
4	HALIFAX HARBOUR
5	HALIFAX PENINSULA
6	HALIFAX ISLAND
7	HALIFAX BAY
8	HALIFAX SOUND
9	HALIFAX STRAIT
10	HALIFAX GULF
11	HALIFAX BAY
12	HALIFAX SOUND
13	HALIFAX STRAIT
14	HALIFAX GULF
15	HALIFAX BAY
16	HALIFAX SOUND
17	HALIFAX STRAIT
18	HALIFAX GULF
19	HALIFAX BAY
20	HALIFAX SOUND
21	HALIFAX STRAIT
22	HALIFAX GULF
23	HALIFAX BAY
24	HALIFAX SOUND
25	HALIFAX STRAIT
26	HALIFAX GULF
27	HALIFAX BAY
28	HALIFAX SOUND
29	HALIFAX STRAIT
30	HALIFAX GULF
31	HALIFAX BAY
32	HALIFAX SOUND
33	HALIFAX STRAIT
34	HALIFAX GULF
35	HALIFAX BAY
36	HALIFAX SOUND
37	HALIFAX STRAIT
38	HALIFAX GULF
39	HALIFAX BAY
40	HALIFAX SOUND
41	HALIFAX STRAIT
42	HALIFAX GULF
43	HALIFAX BAY
44	HALIFAX SOUND
45	HALIFAX STRAIT
46	HALIFAX GULF
47	HALIFAX BAY
48	HALIFAX SOUND
49	HALIFAX STRAIT
50	HALIFAX GULF
51	HALIFAX BAY
52	HALIFAX SOUND
53	HALIFAX STRAIT
54	HALIFAX GULF
55	HALIFAX BAY
56	HALIFAX SOUND
57	HALIFAX STRAIT
58	HALIFAX GULF
59	HALIFAX BAY
60	HALIFAX SOUND
61	HALIFAX STRAIT
62	HALIFAX GULF
63	HALIFAX BAY
64	HALIFAX SOUND
65	HALIFAX STRAIT
66	HALIFAX GULF
67	HALIFAX BAY
68	HALIFAX SOUND
69	HALIFAX STRAIT
70	HALIFAX GULF
71	HALIFAX BAY
72	HALIFAX SOUND
73	HALIFAX STRAIT
74	HALIFAX GULF
75	HALIFAX BAY
76	HALIFAX SOUND
77	HALIFAX STRAIT
78	HALIFAX GULF
79	HALIFAX BAY
80	HALIFAX SOUND
81	HALIFAX STRAIT
82	HALIFAX GULF
83	HALIFAX BAY
84	HALIFAX SOUND
85	HALIFAX STRAIT
86	HALIFAX GULF
87	HALIFAX BAY
88	HALIFAX SOUND
89	HALIFAX STRAIT
90	HALIFAX GULF
91	HALIFAX BAY
92	HALIFAX SOUND
93	HALIFAX STRAIT
94	HALIFAX GULF
95	HALIFAX BAY
96	HALIFAX SOUND
97	HALIFAX STRAIT
98	HALIFAX GULF
99	HALIFAX BAY
100	HALIFAX SOUND

# HALIFAX METROPOLITAN AREA

0 1 2 3 MILES



resulted in a tremendous increase in shipbuilding activity in which the Halifax shipyards participated. In 1854, a treaty of reciprocity was signed with the United States; and the duty-free provisions of the treaty enabled Halifax to build a substantial trade with the New England states.

The American Civil War, while providing short-run economic advantages to the Halifax area (because of the increase in British naval activity), saw the emergence of iron as a major material in shipbuilding. Nova Scotia, without natural resources in iron, was unable to serve the changing shipbuilding needs; and shipbuilding activity in the Halifax area rapidly diminished. In addition, the reciprocity treaty of 1854 was ended in 1866; and the profitable trade which had been built up with the New England states was largely terminated.

The remaining years of the 19th Century were not particularly good years for the Halifax area. Confederation in 1867 and the opening of the Intercolonial Railway in 1876, which were expected to do so much from a political and economic standpoint, had disappointing results for the Maritimes; and Halifax showed only minor economic growth during the period. Despite the setbacks which occurred during the course of the 19th Century, the population of the Halifax area had grown to approximately 30,000 by 1875 and some 50,000 by 1901.

The great war of 1914 to 1918 provided tremendous impetus to growth; and between 1901-1921, the population increased by some 40% to approximately 75,000 persons. In the decade following 1921, Halifax suffered from the full effects of the depression; and large-scale out-migration held population growth to a mere 3,000. However, with the implementation of earlier plans to construct adequate port facilities, the economy of the area moved steadily forward once again; and population increased to approximately 98,000 by 1941. The Second World War provided new growth stimulus; and the expanded naval, military, and air force establishments, together with a great increase in port traffic, supported a rising population. In the years since the war, the Halifax area has experienced continuing growth, the economic base has expanded, and a measure of success has been achieved in attracting secondary industry to the area.

The map on the opposite page shows the location of the Halifax metropolitan area and indicates the various urban and suburban developments which are included within the Halifax CMA boundaries.





HISTORICAL POPULATION GROWTH  
HALIFAX CMA, NOVA SCOTIA, ATLANTIC PROVINCES & CANADA (1901 - 1961)

POPULATION	1901	1911	1921	1931	1941	1951	1956	1961
Halifax CMA	50,968	57,808	75,487	78,600	98,636	133,931	164,200	183,946
Nova Scotia	459,574	492,338	523,837	512,846	577,962	642,584	694,717	737,007
Atlantic Provinces	1,114,937	1,180,574	1,263,361	1,291,000	1,423,000	1,618,126	1,763,692	1,897,425
Canada	5,371,315	7,206,643	8,787,949	10,376,786	11,506,655	14,009,429	16,080,791	18,238,247
% INCREASE OF	1901-1911	1911-1921	1921-1931	1931-1941	1941-1951	1951-1956	1956-1961	1951-1961
Halifax CMA	13.4	30.6	4.1	25.5	35.8	22.6	12.0	37.3
Nova Scotia	7.1	6.4	(2.1)	12.7	11.2	8.1	6.1	14.7
Atlantic Provinces	5.9	7.0	2.2	11.0	12.9	9.0	7.6	17.3
Canada	34.2	21.9	18.1	10.9	21.8	14.8	13.4	30.2
ACTUAL INCREASE OF								
Halifax CMA	6,840	17,679	3,113	20,036	35,295	30,269	19,746	50,015
Nova Scotia	32,764	31,499	(10,991)	65,116	64,622	52,133	42,290	94,423
Atlantic Provinces	65,637	82,787	27,639	142,000	185,126	145,566	133,733	279,299
Canada	1,835,328	1,581,306	1,588,837	1,129,869	2,502,774	2,071,362	2,157,456	4,228,818
HALIFAX CMA	1901	1911	1921	1931	1941	1951	1956	1961
AS A % OF								
Nova Scotia	11.1	11.7	14.4	15.3	17.1	20.8	23.6	25.0
Atlantic Provinces	4.6	4.9	6.0	6.1	6.9	8.3	9.3	9.7
Canada	0.9	0.8	0.9	0.8	0.9	1.0	1.0	1.0
NOVA SCOTIA AS A % OF								
Atlantic Provinces	41.2	41.7	41.5	39.7	40.3	39.7	39.4	38.8
Canada	8.6	6.8	6.0	4.9	5.0	4.6	4.3	4.0
ATLANTIC PROVINCES AS A % OF								
Canada	20.8	16.4	14.4	12.4	12.5	11.6	11.0	10.4

SOURCE: 1961 Census of Canada, Vol. 1.1

Note: Atlantic Provinces include Newfoundland (1901 - 1921 Newfoundland Census, 1931 & 1941 DBS unofficial estimates)

## Population - Historical Growth

The table on the opposite page illustrates the historical relationship which has existed in population and population growth rates between the area which was designated in 1956 as the Halifax CMA, the Province of Nova Scotia, the Atlantic Provinces, and Canada during the period 1901-1961.

While the tables are largely self-explanatory, we would add the following commentary on the significant features and growth trends which may be observed:

### Halifax CMA

This area, for which DBS population statistics are available prior to 1956 under the heading of Subdivision "d" Halifax County and which became in 1956 the Halifax CMA, has experienced steady and substantial growth in all decades other than the period 1921-1931, with the greatest increase both numerically and from a percentage standpoint occurring during the years 1951-1961. It is interesting to note in this connection that the population growth which occurred between 1951 and 1956 was almost twice as great as it was between 1956 and 1961. Population estimates for the area which have been released by DBS since 1961 indicate that the population level has remained relatively stable since that time, although DBS officials point out that the sampling technique which is employed in non-Census years produces estimates only, in which a margin of error exists. The 1966 population Census may, therefore, show that a reasonable population growth occurred during the years 1961-1966 although it is most unlikely that the spectacular advances which were made during the years 1951-1956 will have been repeated.

Because of the relatively slow population growth rate in Nova Scotia and the Atlantic Provinces generally, the Halifax CMA has consistently increased its share of the population in both areas, reflecting in part the general population shift which has taken place throughout Canada from rural to urban life.

The population increases in the Halifax CMA during the period under historical review have enabled it to maintain a fairly constant relationship with the population of Canada as a whole, going from 0.9% of the Canadian population in 1901 to 1.0% in 1961.

### Nova Scotia and the Atlantic Provinces

Official DBS statistics are not available for the Atlantic Provinces for the period 1901-1941 because of the independent status of Newfoundland prior to Confederation with Canada. However, Newfoundland conducted its own Census during the period 1901-1945. The Atlantic Provinces





historical population statistics which we have used have been calculated by adding to the DBS Maritime Provinces population statistics the Newfoundland Census figures for the years 1901, 1911, and 1921 and the DBS unofficial estimates for Newfoundland population in 1931 and 1941 which were calculated from Newfoundland's 1935 and 1945 Census statistics.

While the population of both Nova Scotia and the Atlantic Provinces has increased numerically in every decade (with the exception of Nova Scotia between 1921 and 1931), the growth rate has been slow. As has been indicated elsewhere,\* more people have emigrated from the Atlantic Region than have immigrated into it since records first became available. As a result, population growth in the region has been relatively slow and both the Province of Nova Scotia and the Atlantic Provinces generally have consistently lost ground insofar as their percentage shares of the total Canadian population are concerned. Nova Scotia has dropped from an 8.6% share in 1901 to a 4.0% share in 1961, while the Atlantic Provinces have been reduced from a 20.8% share to approximately 10.4% during the same period.

#### Canada

The population growth rate for Canada has been very high when compared with other developed nations of the Western World. The population in fact multiplied approximately six times between the years 1851 and 1951, with periods of rapid growth interspersed with periods of moderate growth. Unprecedented expansion occurred during the first decades of the Twentieth Century, but the growth rate fell off sharply during the depression years. By 1941, the rate of population growth began once more to increase; and an intercensal record population growth took place between the years 1941-1951. In view of the record that was established during this decade, the population growth between the years 1951-1961 (an absolute increase approximately double that of the preceding decade) was outstanding. It has been estimated that, of the total increase occurring between the years 1951-1961, some 27.4% was represented directly by 1951-1961 immigrant residents. The DBS estimate for the population of Canada at April 1, 1965, was 19,516,000 or an increase of approximately 1,280,000 which would indicate that the population growth rate has slowed considerably from the pace set in the 1951-1961 decade.

Having reviewed the significant factors and trends which have been established historically between the populations and population growth rates of the CMA, Nova Scotia, the Atlantic Provinces, and Canada, we will now examine the various forecasts for population growth which have been made in recent years and, on the basis of established trends, indicate the range of population possibilities for the Halifax CMA to 1986.

---

\* Karí Levitt - Population Movements in the Atlantic Provinces.







POPULATION PROJECTIONS (CANADA)

ROYAL COMMISSION ON HEALTH SERVICES  
(Stukel: Population Projections 1966-1991)  
(000's)

<u>Rate of Net "In-migration"</u>	<u>1966</u>	<u>1971</u>	<u>1976</u>	<u>1981</u>	<u>1986</u>
25,000	20,159.0	22,286.7	24,743.5	27,552.6	30,630.4
50,000*	20,269.5	22,589.5	25,233.5	28,246.7	31,545.9
100,000	20,571.3	23,195.3	26,213.2	29,635.0	33,377.0

ROYAL COMMISSION ON CANADIAN ECONOMIC PROSPECTS  
(Gordon Report)  
(000's)

<u>Rate of Net "In-migration"</u>	<u>1965</u>	<u>1970</u>	<u>1975</u>	<u>1980</u>	<u>1985**</u>
50,000	19,210	21,160	23,310	25,770	28,424
75,000*	19,520	21,640	23,990	26,650	29,518
100,000	19,820	21,000	24,660	27,630	30,721

STAFF STUDY #1 PREPARED FOR THE  
ECONOMIC COUNCIL OF CANADA  
(000's)

<u>Rate of Net "In-migration"</u>	<u>1965</u>	<u>1966</u>	<u>1967</u>	<u>1968</u>	<u>1969</u>	<u>1970</u>
50,000	19,646.0	20,038.9	20,440.6	20,854.2	21,286.2	21,729

\* Rate of net "in-migration" for which respective Commissions announced preference  
\*\* Estimated.

## Population Projections - Canada

In February of 1957, William C. Hood and Anthony Scott produced their study entitled "Output, Labour, and Capital in the Canadian Economy" for the Royal Commission on Canada's Economic Prospects. This study contains population and labour force projections for Canada for the period 1960-1980. More recently (1964), independent population projections for Canada have been developed for the Royal Commission on Health Services.

Both of the above-mentioned projections were based upon the generally accepted technique of moving population ahead by age and sex groups having regard for age - specific fertility and mortality rates (cohort survival technique) - and upon certain basic assumptions which were made with respect to the probable rate of net migration into Canada. Using the same technique, population projections for Canada for the period 1965-1970 have recently been prepared for the Economic Council of Canada. The tables opposite reproduce the relevant portions of the three population projections to which we have referred. While the staff study for the Economic Council of Canada is of limited value to us because of the relatively short period covered by its projections, it is significant to the extent that the population projection for the year 1970 is within 89,000 or 0.41% of the projection produced by Hood and Scott some eight years earlier. In this connection, it is interesting to note that the April 1, 1965, population estimate for Canada which was issued by DBS in May of this year is within 0.5% of the Hood and Scott projection for 1965.

Assuming that the Halifax CMA will have the continuing capacity to support a population growth sufficient to maintain the 1951 and 1961 position of the CMA relative to Canada as a whole (i.e., 1%) and assuming that the projections produced for the two Royal Commissions present the probable future range of Canadian population, the population range for the CMA would be as follows:

1.	<u>Royal Commission on Health Services Projections</u> (Halifax CMA at 1%)				
	<u>1966</u>	<u>1971</u>	<u>1976</u>	<u>1981</u>	<u>1986</u>
Halifax CMA	202,695	225,895	252,335	282,467	315,459
2.	<u>Royal Commission on Canada's Economic Prospects Projections</u> (Halifax CMA at 1%)				
	<u>1965</u>	<u>1970</u>	<u>1975</u>	<u>1980</u>	<u>1985*</u>
Halifax CMA	195,200	216,400	239,900	266,500	295,180

\* Estimated.





POPULATION PROJECTIONS (ATLANTIC PROVINCES) 1965-1980  
(000's)

Hood and Scott Projections

<u>Net Canadian "In-migration" of:</u>	<u>1965</u>	<u>1970</u>	<u>1975</u>	<u>1980</u>
50,000	1,990	2,100	2,200	2,330
75,000*	2,000	2,120	2,240	2,360
100,000	2,010	2,140	2,260	2,360

Nowlan Projections

<u>Net Atlantic Province "Out-migration" of:</u>	<u>1965</u>	<u>1970</u>	<u>1975</u>	<u>1980</u>
11,000	2,009	2,145	2,312	2,505
10,500*	2,012	2,152	2,323	2,520
10,000	2,014	2,156	2,331	2,534

\* Rates of net "in-migration" and "out-migration" for which authors stated preference.

It is noteworthy that, if the Halifax CMA population projection for 1985 is extended to 1986, the two 1986 population projections will be less than 5% apart, which is an acceptable range for planning purposes having regard to the length of time covered by the projections.

#### Population Projections - Regional

The projections for Canada which we have quoted are, in our opinion, the most authoritative data currently available for the country as a whole. On a regional basis, while Hood and Scott derived regional estimates from their projections for Canada, D. M. Nowlan of the Mineral Resources Division of the Department of Mines and Technical Surveys of the Federal Government has made population projections for the Atlantic Provinces alone for the period 1960 to 1980.

Mr. Nowlan employed the cohort survival technique in order to arrive at his population projections. After a careful study of available data, Mr. Nowlan concluded that the consistent net out-migration from the Atlantic Provinces would continue at an average rate of 10,500 persons per year; and he adjusted his projections to reflect this continuing out-migration.

The Hood and Scott and Nowlan projections for the Atlantic Provinces are reproduced on the opposite page. While the rate at which the Halifax CMA increased its share of the Atlantic Provinces population was somewhat erratic until 1941, it is significant that its share has consistently increased at a rate of 1.4% per decade for the last two decades. Also of significance is the fact that the rate of increase was substantially reduced during the latter half of the 1951 to 1961 decade. As was pointed out earlier, DBS annual estimates since 1961 indicate that the Halifax CMA is not repeating in the first half of the present decade the rapid growth which it experienced between 1951 to 1956. Under the circumstances, a 0.8% increasing share of the Atlantic Provinces population per decade may produce more realistic estimates than a 1.4% increasing share.

The tables following project the Halifax CMA population as a 0.8% and a 1.4% per decade increasing share of the preferred estimates of the Atlantic Provinces which were prepared by Hood and Scott and D. M. Nowlan:







POPULATION PROJECTIONS HALIFAX CMA

	<u>1965</u>	<u>1970</u>	<u>1975</u>	<u>1980</u>	<u>1985</u>
Dartmouth Report (1965)	200.0	230.0	264.0	290.0	335.0
Canadian British Engineering (1956)		225.0		(300.0)*	338.0
Prof. Sinclair Economic Base Study (1958)**				280.0	

COMPARATIVE RANGE OF POPULATION POSSIBILITIES\*

	<u>1965</u>	<u>1970</u>	<u>1975</u>	<u>1980</u>	<u>1985</u>	
<u>Derived from Hood and Scott Regional Estimates</u>						
1. @ 0.8% increasing share	200.0	222.5	244.0	266.6	290.0	
2. @ 1.4% increasing share	205.1	232.5	261.0	291.8	324.0	
<u>Derived from Nowlan Regional Estimates</u>						
1. @ 0.8% increasing share	201.2	226.0	253.2	284.8	318.2	
2. @ 1.4% increasing share	206.5	236.0	270.8	311.5	355.5	
<u>Based on 1% of Canadian Population</u>						
1. Hood and Scott Projection	195.2	216.4	239.9	266.5	295.2	
	<u>1966</u>	<u>1971</u>	<u>1976</u>	<u>1981</u>	<u>1986</u>	<u>(1985)***</u>
2. Royal Commission on Health Services Projection	202.7	225.9	252.3	282.5	315.5	308.9

\* Extension of projections to the nearest 100 is arithmetical. It is not intended to suggest that such a high degree of accuracy is, or should be relied upon.

\*\* This was not really a population projection but rather an estimate of the population that would be supportable by an economic base of a certain size.

\*\*\* Estimated.

Hood and Scott Preferred Estimates

	<u>1961*</u>	<u>1965</u>	<u>1970</u>	<u>1975</u>	<u>1980</u>	<u>1985**</u>
Atlantic Provinces Population (000's)	1,897.4	2,000.0	2,120.0	2,240.0	2,360.0	2,480.0
<u>Halifax CMA:</u>						
Increasing Share 0.8%	9.70%	10.00%	10.50%	10.90%	11.30%	11.70%
Population (000's)	183.9	200.0	222.5	244.0	266.6	290.0
Increasing Share 1.4%	9.70%	10.26%	10.96%	11.66%	12.36%	13.06%
Population (000's)	183.9	205.1	232.5	261.0	291.8	324.0

Nowlan Preferred Estimates

	<u>1961*</u>	<u>1965</u>	<u>1970</u>	<u>1975</u>	<u>1980</u>	<u>1985**</u>
Atlantic Provinces Population (000's)	1,897.4	2,012.0	2,152.0	2,323.0	2,520.0	2,720.0
<u>Halifax CMA:</u>						
Increasing Share 0.8%	9.70%	10.00%	10.50%	10.90%	11.30%	11.70%
Population (000's)	183.9	201.2	226.0	253.2	284.8	318.2
Increasing Share 1.4%	9.70%	10.26%	10.96%	11.66%	12.36%	13.06%
Population (000's)	183.9	206.5	236.0	270.8	311.5	355.5

☆ Actual.  
\*\* Estimated.

Population Projections - Halifax CMA

A number of reports have been produced in recent years covering the Halifax CMA or portions thereof. The various population projections which have been made in these reports are reproduced on the opposite page together with the various preliminary population possibilities which we have developed from the national and regional projections which we have discussed. As may be seen from the table, the range of population possibilities for 1985 is quite considerable, with 290,000 as the low point and 355,500 as the high point.

It is interesting to note that the projections of the Halifax CMA population which are based on a 0.8% per decade increasing share of the projected Atlantic Provinces population fall very close to the projections for the Halifax CMA which are based on a continuing 1% share of the projected



population of Canada. Specifically, the 1985 projection derived from the Hood and Scott Atlantic Provinces estimates is within 1.8% of the projection derived from the Hood and Scott estimates for Canada, while the 1985 projection based on the Nowlan estimates is within 3% of the population figure derived from the Royal Commission on Health Services estimate for Canada and adjusted by us to 1985.

It is reasonable to assume that the population of the Halifax CMA should fall somewhere within the range of population possibilities indicated in the previous table. In order to enable us to more precisely identify the probable population levels for the Halifax CMA in the period to 1986, the following section of the report examines the labour force and the economic base of the Halifax CMA with particular reference to feasible growth rates for the labour force and the areas of the economy in which growth is likely to occur.







	1951		1961		Increase 1951-1961 Number %
	Number	% of Total	Number	% of Total	
<b>A. Services</b>					
1. Defence	11,139	20	17,782	24	6,643 60
2. Health	2,899	5	4,662	6	1,763 61
3. Provincial, Municipal & Other Governments	1,799	3	2,369	3	570 32
4. Other Federal Government	1,890	3	2,338	3	448 24
5. Other Community Services & Business	2,249	4	2,599	4	350 16
6. Personal Services	3,462	6	5,342	7	1,880 54
7. Education	1,691	3	2,801	4	1,110 66
<b>TOTAL SERVICES</b>	<u>25,129</u>	<u>45</u>	<u>37,893</u>	<u>52</u>	<u>12,764</u> <u>51</u>
<b>B. Trade</b>					
1. Wholesale	4,336	8	3,728	5	-608 -14
2. Retail	7,119	13	8,338	11	1,219 17
<b>TOTAL TRADE</b>	<u>11,455</u>	<u>21</u>	<u>12,066</u>	<u>17</u>	<u>611</u> <u>5</u>
<b>C. Manufacturing**</b>					
1. Shipbuilding & Repair	1,362	2	1,073	1	-289 -21
2. Confectionary	650	1	606	1	-44 -7
3. Canned & Cured Fish	653	1	606	1	-47 -7
4. Petroleum Refining	290	1	497	1	207 71
5. Printing & Publishing	390	1	564	1	174 45
6. Aircraft & Parts	239	**	752	1	513 215
7. Cordage, Rope & Twine	77	**	4	**	-73 -95
8. Malt Liquors	149	**	171	**	22 15
9. Carbonated Beverages	140	**	164	**	24 17
10. Commercial Printing	228	**	242	**	14 6
11. Other	2,785	5	3,270	4	485 17
<b>TOTAL MANUFACTURING</b>	<u>6,963</u>	<u>13</u>	<u>7,949</u>	<u>11</u>	<u>986</u> <u>14</u>
<b>D. Other Industries</b>					
1. Transport., Storage & Comm.	5,232	9	6,359	9	1,127 22
2. Finance, Insurance, Real Estate	1,899	3	2,988	4	1,089 57
3. Construction	3,709	7	3,373	5	-336 -9
4. Electricity, Gas & Water	880	2	800	1	-80 -9
5. Primary Industries	243	**	382	1	139 57
6. Not Stated		-	1,143	2	1,143 25
<b>TOTAL OTHER INDUSTRIES</b>	<u>11,963</u>	<u>22</u>	<u>15,045</u>	<u>21</u>	<u>3,082</u> <u>26</u>
<b>TOTAL</b>	<u>55,510</u>	<u>100</u>	<u>72,953</u>	<u>100</u>	<u>17,443</u> <u>31</u>

## SECTION II

### LABOUR FORCE AND THE ECONOMIC BASE

#### A Review of Recent Trends

In order to provide an analysis of labour force growth trends in the Halifax CMA during the period 1951-1961, we have used the 1951 labour force estimates produced by Professor Alisdair M. Sinclair (Professor of Economics at Dalhousie University) for the Halifax Metropolitan Area Economic Base study which was published by the Institute of Public Affairs in 1961. To arrive at our 1961 estimates, we have taken the 1961 DBS labour force statistics for the Halifax CMA and adjusted them as far as is possible to compare with 1951 classifications and definitions. The table on the opposite page shows the estimated numerical and percentage composition and change in the Halifax labour force in the period 1951 to 1961.

When comparing 1951 and 1961 labour force statistics, it should be borne in mind that a number of significant changes have taken place in the methods used by DBS to report these statistics. Between 1951 and 1961, several of the classifications were changed (these changes can be seen by comparing the different classifications used opposite with the table facing page 26 showing Canadian and Halifax CMA 1961 labour force). In addition to the changes in classification which are reasonably easy to identify and compensate for, changes were also made in definition, and certain groups of labour force were moved from one classification to another. An obvious example of this change is the reclassification of the repair services labour force from the trade sector to the manufacturing sector.

While some of the labour force groups which were reclassified between 1951 and 1961 can be identified from the Census figures for the Halifax CMA, others (like veterinarians, dental mechanics and highway and bridge employees) are not reported as a separate group and cannot, therefore, be specifically identified. As a result any attempt to make either direct comparisons between unadjusted 1951 and 1961 labour force figures or comparisons after making adjustments for changes in classification only is liable to produce a distorted picture of the changes which actually occurred. Even where adjustments have been made as far as possible to cover changes in definition, the numbers produced are somewhat indefinite and must be treated with this reservation and regarded only as broad and imperfect indications of labour force changes during the decade.

One additional qualification of the table should be made, and that is that the Census of Labour Force is based upon residence rather than place of employment. We have assumed for purposes of our analysis



that the labour force reported for the Halifax CMA is employed in the CMA and that the nonresident labour force does not constitute a large enough factor to change the labour force growth patterns significantly. With these reservations in mind, labour force was defined by the DBS in 1961 as containing all persons 15 years of age or over who were reported as having a job of any kind, either part-time or full-time (even if they were not at work) or were reported as looking for work during the week prior to enumeration. The classification excludes those potential members of the work force who were reported as looking for their first job or who were reported as not looking for work at all. As a matter of interest, labour force as defined in 1961 also differs from the 1951 classification by the exclusion of persons age 14 to 15. Prior to 1951, a "gainfully employed" concept was used, so that the pre-1951 statistics would not in any event be directly comparable with 1951 or later statistics.

In the following pages, we will examine and discuss the changes in the Halifax CMA labour force during the period 1951-1961, as indicated by the preceding table and compare the composition of the Halifax CMA and Canadian labour force in 1961 (based upon the actual 1961 DBS statistics), in order to identify growth trends and potential growth areas for the Halifax CMA labour force.

#### A. Service Sector

One of the most significant features of the 1951 and 1961 Halifax CMA labour force statistics is the large percentage of the labour force which is reported for defence services. It is reasonable to suppose that Halifax, providing as it does, the main base for the Royal Canadian Navy on the Atlantic Coast, would have a fairly high defence services labour force. The statistics indicate that almost one-quarter of the Halifax CMA labour force in 1961 was reported for defence services, and that this number was an increase of some 60% over the 1951 reported figure. It is particularly important to note that the numerical increase of approximately 6,643 between 1951 and 1961 represents some 38% of the total labour force increase during the period.

Contrary to the fairly logical assumption (made by the Royal Commission on Canada's Economic Prospect) that Canada's Armed Forces personnel would at best stabilize during a period of prolonged peace, substantial increases have taken place in the defence establishment during the past decade. Despite these recent increases, it would be our opinion that the Canadian labour force attributable to defence services will probably stabilize at approximately the 1961 level. We can see no reason why such stabilization in Canadian defence services' numerical strength should not apply equally to the Halifax CMA which currently represents some 11% of the total



Canadian defence services labour force. Our assumption that the defence services will be held at approximately the 1961 level is supported in part by the Government White Paper on defence which was published in March, 1964. The White Paper indicates that, as a result of planned integration of the three services, the Canadian Armed Forces will, in fact, be somewhat reduced from current levels.

Stabilization of defence services labour force in the Halifax CMA will result in defence services representing a reducing percentage of the total labour force as the Halifax CMA economy expands in other areas. In this connection, we would point out the possibility that the Government of Canada may make particular efforts to offset lack of growth in defence services in the Halifax CMA by increasing the area's share of defence contracts which would make up for any loss incurred and result in above-normal growth for other sectors of the economy. While it is, of course, impossible to forecast government policy, concern at the federal level for the relatively slow rate of economic growth which has been experienced over the years by the Atlantic Provinces may be sufficient to offset the plant and skilled manpower advantages of the major manufacturing areas of Canada insofar as the granting of defence contracts is concerned.

Of the other industry groups within the service sector, it would appear that health and education showed substantial labour force gains during the decade. The rapid growth in these fields serves to emphasize the dominant regional role played by the Halifax CMA in both higher education and public health. The campus development plan which was prepared for Dalhousie University in 1964 is representative of the projected expansion of student enrollment and facilities in the field of higher education which should affect all of the universities and colleges located within the Halifax CMA. In the field of public health, the proposed Sick Children's Hospital and the expansion which is taking place in existing facilities may be expected to further strengthen the regional role of the Halifax CMA health services. It should be anticipated that both education and health will continue to grow at an accelerated rate and that, because of its dominant regional influence in these fields, the percentage of the labour force in each field within the Halifax CMA will continue to rise.

The strong position of the Halifax CMA with respect to government administration is indicated by the fact that two city administrations, the county offices, the provincial government, and the main regional offices of the federal government all are located within its boundaries. Steady and above-average labour force growth occurred during the decade (an average 27% labour force increase for all levels of government). It is reasonable to assume that this growth will continue probably at a slightly accelerated rate during the period



covered by our projections as the various levels of government continue to expand their range of activities.

While personal services showed substantial labour force growth during the decade, growth in other community and business services was less marked. This group includes religious organizations, motion picture and recreational services, a wide variety of services to business management, and various personal services including shoe repair shops, barber and beauty shops, laundries, hotels and taverns, restaurants, clubs, and funeral homes. The majority of the services classified in this grouping are of a local nature and will grow at a rate which is dependent upon population increases and increases in per capita disposable income within the Halifax CMA. It is significant that labour force growth in the service sector as a whole amounted to some 12,764 persons out of a total labour force growth of 17,443, or approximately 74% of the total growth.

Rapid growth in the service sector labour force was experienced generally throughout Canada during the decade so that the statistics for the Halifax CMA reflect a fairly general trend although the Halifax statistics are magnified by the significant amount of growth which occurred in the defence services labour force.

#### B. Trade Sector

The statistics indicate that a fairly marked growth occurred in the labour force reported for retail trade during the 1951-1961 decade; however, this growth was largely offset by a reduction of some 14% in the wholesale trade labour force during the same period. We are unable to identify the reason for the apparent drop in wholesale labour force since both wholesale and retail trade volumes have grown steadily and the regional significance of the Halifax CMA as a wholesale trade centre does not appear to be diminished.

#### C. Manufacturing Sector

In the manufacturing sector, reductions in labour force occurred in three of the basic industries for the area; shipbuilding and repair, confectionery, and canned and cured fish products. While the reasons for these labour force reductions are not apparent, it is probable that they occurred at least in part as a result of an increase in automated operations. The rate at which industry will automate and the net effect that this will have on labour force growth is one of the principal unknowns involved in any analysis of future labour force requirements. Because of the nature of the manufacturing process, automation may have a more marked effect on this sector of the economy than on the other sectors. While it is not our intention to attempt





to identify the probable effects that automation will have on labour force growth in the period to 1986, it should be borne in mind that as a result of automation, the economy will have to grow at an accelerated rate in future years if projected labour force increases are to be absorbed. Despite the reductions in manufacturing labour force which we have referred to, the total manufacturing sector showed a labour force increase of some 986 or 14% during the decade.

Since the manufacturing sector of the economy must be looked to in particular for sustained and above-average growth if the economy of the Halifax CMA is not to suffer as a result of stabilization of the defence services labour force, this sector of the economy requires more detailed examination.

The tables in Appendix B indicate the number of labour force reported for each industry within the manufacturing sector in 1961 and show the relationship of the City of Halifax and Halifax CMA to Nova Scotia, the Atlantic provinces and Canada. The tables are derived from 1961 DBS labour force statistics and have not been adjusted by us. They are not, therefore, comparable with the adjusted statistics which appear in the previous table.

Of the total Halifax CMA manufacturing labour force of 7,472, approximately 4,300 or 58% were reported for two types of manufacturing industries. The food and beverage industries accounted for a labour force of 2,442 or approximately 33% of the total, which compares with the Canadian percentage of 16%, while transportation equipment industries reported a labour force of 1,875 (25%) which compares with 8% for Canada. These leading employers of the manufacturing labour force are followed by:

<u>Industries</u>	<u>No. of Employees</u>	<u>Percentage of Manufacturing Labour Force</u>	
		<u>Halifax</u>	<u>Canada</u>
Food & Beverage	2,442	33.0	16.0
Transportation Equipment	1,875	25.0	8.0
Printing & Publishing	843	11.3	6.0
Petroleum & Coal	497	6.7	1.2
Electrical Products	409	5.5	6.0
Metal Fabricating	300	4.0	7.4
Nonmetallic Mineral Production	247	3.3	3.4
Chemical & Chemical Products	201	2.7	4.9

The leading position of the food and beverage industries reflects in particular the influence of the fishing industry, which has long been established as the basic primary industry of the area, as well as the regional influence of established brewers of malt beverages



and producers of carbonated beverages and the dominant position of Moirs Limited in the manufacture of chocolates and confectionery. In the transportation equipment industry, the Halifax shipyards of the Dominion Steel & Coal Corporation and the Fairey Canada Limited facilities in Dartmouth represent approximately 97% of the total labour force reported for the industry. The printing and publishing industry labour force in the Halifax CMA represents approximately 40% of the total labour force for this industry in Nova Scotia, which is an indication of its regional significance. The Halifax Herald Limited is the leading employer of labour force within the industry, and there are some 30 other printing establishments located within the Halifax CMA.

Petroleum and coal products industries are largely represented by the Imperial Oil and Texaco refineries on the Dartmouth side of the harbour. The recently announced \$2,000,000 expansion of the Imperial Oil refinery will add substantially to existing production facilities, although the level of automation in the petroleum refining industry makes it unlikely that the expansion will result in a substantial increase in permanent labour force.

In the electrical products industry (which represents 5.5% of the total Halifax CMA labour force) E.M.I. Cossor Electronics Ltd. and Philips Electrical Company Limited are representative of the Halifax CMA manufacturers of electrical products which employ some 78% of the Nova Scotia labour force and 43% of the Atlantic Provinces labour force in this industry. The degree of industrial concentration of the electrical products industry within the Halifax CMA is exceeded only by petroleum refining. This is particularly significant since the electrical and electronics industry has exhibited tremendous growth potential in recent years.

A review of the manufacturing sector of the economy would not be complete without reference to the work which has been done by Industrial Estates Limited to create conditions which are sufficiently favourable to induce secondary manufacturers to locate within the Halifax area. Secondary industry, other than that which is connected with local primary industries (farming, fishing and logging) has generally tended to avoid the Atlantic region. The level of population of the Atlantic provinces and the rate of growth have not been particularly attractive to industries which have tended to make the local market potential a major criteria of site location. As was pointed out by the Royal Commission on Canada's economic prospects\* - "it is difficult to be as optimistic about the prospects for secondary industry in the ... Maritimes, in view of the expected slower rate of growth ... , and their comparative proximity to Ontario and Quebec manufacturers." Assistance from the federal government in the form of relief under the Income Tax Act has encouraged some manufacturing industries to locate in

---

\* Canadian secondary manufacturing industry.



the areas designated by the Act. Halifax and Dartmouth, not being designated under the Income Tax Act, are unable to offer this form of incentive to manufacturing development; nevertheless, a measure of success has been achieved in attracting manufacturers such as Volvo (Canada) Ltd., Philips Electrical Company Limited, and Maritimes Cans Limited to settle in the area.

#### D. Other Industries Sector

The three principal industries within the other industries sector are transportation, storage, and communication; finance, insurance and real estate; and construction. The percentage of the labour force attributable to transportation, storage and communication reflects the position of Halifax as the leading East Coast deep sea port for Canada. Of the 1961 labour force of 6,359, approximately 47% is reported for land or sea transportation and related services. Of the balance, the largest portion (21%) is reported for the various communication media including radio and television broadcasting, telephones, and post office.

Rapid labour force growth in the transportation industry will depend to a large degree on the expansion of general cargo handling through the Port of Halifax facilities. The expansion of port facilities recently announced by the National Harbour Board will improve Halifax's capacity for handling water borne freight. However, the prospect of increasing winter navigation on the St. Lawrence River under existing freight rate conditions (both ocean and rail) suggests the possibility that the Port of Halifax may be used increasingly as a regional rather than a national point of import and export. This changing role will almost certainly result if substantial quantities of goods and passengers to and from the more westerly parts of Canada are diverted to the St. Lawrence River ports during the winter time. At present, the concept of winter navigation has not been tested by wide enough practical application from shipping interests for the probable effect on the Canadian-Atlantic Coast ports to be adequately estimated.

In the fields of finance, insurance and real estate, substantial labour force growth occurred for the Halifax CMA during the period 1951 to 1961. Because of the regional importance of Halifax in business and administration, it would be reasonable to anticipate accelerated labour force growth in these fields in future years to reflect the increasing role of business services in the total economy.

The reduction in construction industry labour force during the decade results at least in part from the small amount of significant major developments within the CMA during the period. Recent apartment and commercial construction together with redevelopment







1961 LABOUR FORCE - HALIFAX CMA AND CANADA

Industry	Halifax CMA		Canada	
	Persons	Percent Composition*	Persons	Percent Composition
All Industries	72,953	100.0%	6,471,850	100.0%
A. Community, Business/Personal Service	15,515	21.3%	1,263,362	19.5%
Education/Related Services	2,877	3.9%	266,901	4.1%
Health/Welfare	4,988	6.8	307,433	4.8
Religious Organizations	682	0.9	53,130	0.8
Motion Picture/Recreational Services	395	0.5	39,837	0.6
Services to Business Management	1,059	1.5	98,987	1.5
Personal Services	4,657	6.4	437,518	6.8
Miscellaneous Services	857	1.2	59,556	0.9
B. Public Administration/Defence	21,981	30.1%	482,925	7.5%
Defence	17,782	24.4%	173,029	2.7%
Other Federal Administration	1,830	2.5	111,924	1.7
Provincial Administration	1,083	1.5	68,761	1.1
Local Administration	1,267	1.7	123,729	1.9
Other Governments	19	***	5,482	0.1
C. Trade	12,432	17.0%	991,490	15.3%
Wholesale	4,088	5.6%	289,884	4.5%
Retail	8,344	11.4	701,606	10.8
D. Manufacturing	7,472	10.2%	1,404,865	21.7%
E. Other Industries	15,553	21.3%	2,329,208	36.0%
Transportation, Communication/Other				
Utilities	7,667	10.5%	603,286	9.3%
Finance, Insurance/Real Estate	2,988	4.1	228,905	3.5
Construction	3,373	4.6	431,093	6.7
Primary Industries	382	0.5	907,331	14.0
Not Stated	1,143	1.6	158,593	2.5

SOURCE: 1961 Census of Canada, Vol. 3.2.

\* Due to rounding, may not add to totals and subtotals.

\*\*\* Less than 0.05%.

of the central redevelopment area and execution of a number of development projects which are currently in the planning stage could result in substantial increases in the labour force in this industry.

The electricity, gas, and water industries, which have been classified by DBS in 1961 as "other utilities" under the heading of "transportation, communication, and other utilities," showed some reduction in labour force between 1951 and 1961. However, neither this industry nor the primary industries play a significant part in the composition of the labour force in the Halifax CMA. While some labour force growth should be anticipated in the utilities industry to service the needs of an expanding population, it is unlikely that a significant increase will occur in the primary industries labour force in future years. Statistics would indicate that the labour force of the other industries sector increased by some 26% during the decade, accounting for approximately 18% of the total labour force increase of 17,443. Types of industry are so varied within this sector that it is impossible to make any meaningful comment about growth prospects of the sector as a whole. While primary industries cannot be expected to provide a source for labour force growth, transportation, finance, insurance and real estate, and construction in particular indicate significant growth potential.

#### Perspectives for Growth

The foregoing review of growth trends in the Halifax CMA labour force suggests a number of areas in which an accelerated growth rate would appear to be feasible. The table on the opposite page compares the percentage composition of the labour force reported for Canada and the Halifax CMA for the year 1961. These figures have not been adjusted from DBS 1961 classifications and definitions and are therefore not comparable with earlier statistics.

By comparing percentage composition of the labour force for the two areas, and assuming that the Canadian figure represents the norm for Canada, it is possible to identify in very general terms the sectors of the economy in which the Halifax CMA varies substantially above or below the norm.

The most significant variations in labour force composition occur in the public administration and defence sector and in the manufacturing sector. We have suggested earlier that the Halifax CMA defence services labour force will probably stabilize at approximately the 1961 level. This being so, this sector will represent a reducing percentage of the total CMA labour force in the years ahead. The particular regional importance of the Halifax CMA in this sector would, however, suggest that the area will continue to maintain a labour force in this sector which will represent a substantially higher percentage of total labour force than the norm.



To a large degree, the manufacturing sector provides the greatest potential for accelerated labour force growth. The Halifax CMA lags far behind Canada in the percentage of its labour force reported for this sector of industry; however, the comparatively rapid growth which occurred during the 1951-1961 decade indicates that the long-established inability of the area to attract new secondary industry is being overcome. Moreover, the increase in population in the region is a factor which will work in favour of accelerated manufacturing growth in future years.

The regional strength of the Halifax CMA is such that expansion of the service sector of the economy (including finance and insurance) to adequately serve the expanding regional population should result in substantial labour force increases in future years, especially since this sector of the economy generally does not lend itself to a high degree of mechanization. While the percentage of the Halifax CMA labour force reported for the community, business, and personal services section was some 2% higher than Canada in 1961, other regional centres like Edmonton, London, Regina, and Vancouver each report approximately 24% of their labour force in the services section which would suggest the possibility of an accelerated growth rate in this section of the Halifax CMA economy.

While it is impossible to be definitive about the rate of labour force growth during the period covered by our projections, our review of past trends combined with examination of the sectors of the economy in which the Halifax CMA would appear to vary substantially from the norm suggests that the Halifax CMA should plan for an average labour force growth rate in the neighbourhood of 3% per year on the 1961 labour force base during the next two decades. Actual performance will, of course, depend to a large extent on a concerted and coordinated effort by the various local governments within the metropolitan area to attract and locate secondary industry and service establishments within the area and to maintain the dominant role of Halifax as an administrative and business centre.

#### Population and Labour Force

The relationship between labour force and total population over a period of years has been relatively constant. For example, the high and low participation rates for the labour force in Canada during the period 1911 to 1961 were 35.5% and 37.7% (expressed as a percentage of total population) if the abnormal figure of 39.2% in 1941 which resulted from war-time conditions is excluded. The Nova Scotia labour force participation rate during the same period, again excluding the 1941 figure, ranged from a low of 34.36% to a high of 35.34%. Historical DBS data for the Halifax CMA are not available; however, using Professor Sinclair's 1951 labour force estimates, the participation rate in the Halifax CMA was 41.5% in 1951 and had decreased to 39.7% in 1961.



Hood and Scott and D. M. Nowlan have both produced projected labour force participation rates for the Atlantic region (see table below) which indicate a gradually rising participation rate during the period 1960-1980.

Labour Force Participation Rates  
Atlantic Provinces 1960-1980  
Expressed as a % of Population

	<u>1960</u>	<u>1965</u>	<u>1970</u>	<u>1975</u>	<u>1980</u>
Hood and Scott Estimates	29.2%	29.2%	29.7%	29.8%	30.0%
D. M. Nowlan Estimates	30.1%		31.5%		31.5%

However, these estimates for the Atlantic Provinces are based at least in part on the generally low labour force participation rate which currently exists in the Atlantic Provinces when compared to Canada. The Halifax CMA on the other hand, with a 1961 labour force participation rate of 39.7%, has a higher rate than Canada and is reasonably comparable with other CMA's as is indicated by the following table.

Labour Force Participation Rates - 1961  
Selected Metropolitan Areas

	<u>Labour Force</u>	<u>Population</u>	<u>Participation Rate</u>
Halifax	72,953	183,946	39.5%
Calgary	109,256	279,062	39.1%
Edmonton	131,576	337,568	39.0%
Hamilton	151,637	395,189	38.4%
London	73,840	181,283	40.7%
Montreal	806,973	2,109,509	38.3%
Ottawa	167,712	429,750	39.0%
Quebec	126,411	357,568	35.4%
Toronto	789,651	1,824,481	43.3%
Vancouver	294,759	790,165	37.3%
Windsor	68,659	193,365	35.5%
Winnipeg	194,320	475,989	40.9%

Under normal growth conditions, we would expect the Halifax CMA labour force participation rate to remain relatively stable during the period covered by our projections. While there may be some cyclical fluctuations,



the average participation rate should fall within a range of 39% to 41%. These are, of course, broad estimates rather than the result of a detailed and sophisticated analysis of projected labour force participation rates by male and female age groups. However, the value of a detailed projected labour force analysis for as small an area as the Halifax CMA is doubtful since the various factors affecting labour force growth become less predictable and less meaningful as the size of the study area and labour force is reduced.

We have selected 40% (being the midpoint in the suggested range) as the probable average labour force participation rate for the Halifax CMA during the period to 1986 with the cautionary reminder that labour-force-to-population ratios may be changed by the effects of automation during future years.







HALIFAX CMA

COMPARATIVE RANGE OF POPULATION POSSIBILITIES  
(Labour Force at 40% of Population)

	<u>1965</u>	<u>1970</u>	<u>1975</u>	<u>1980</u>	<u>1985</u>
<u>Derived from Hood and Scott Regional Estimates</u>					
1. @ 0.8% Increasing Share	200.0	222.5	244.0	266.6	290.0
Labour Force @ 40% (Average annual labour force growth 2.2%)	80.0	89.0	97.6	106.6	116.0
2. @ 1.4% Increasing Share	205.1	232.5	261.0	291.8	324.0
Labour Force @ 40% (Average annual labour force growth 2.9%)	82.0	93.0	104.4	116.7	129.6
<u>Derived from Nowlan Regional Estimates</u>					
3. @ 0.8% Increasing Share	201.2	226.0	253.2	284.8	318.2
Labour Force @ 40% (Average annual labour force growth 2.9%)	80.5	90.4	101.3	113.9	127.3
4. @ 1.4% Increasing Share	206.5	236.0	270.8	311.5	355.5
Labour Force @ 40% (Average annual labour force growth 3.6%)	82.6	94.4	108.3	124.6	142.2

### SECTION III

#### HALIFAX CMA POPULATION PROJECTIONS - 1966-1986

Returning to the range of preliminary population possibilities for the Halifax CMA, the table on the opposite page shows the population estimates which have been derived from the regional population projections and indicates the size of the labour force which would exist under each estimate at a labour-force-to-population ratio of 40%.

Working from the 1965 base, the annual average labour force growth required to meet the various labour force projections ranges from 2.2% for the first projection to 3.6% for the fourth projection. The second and third projections each require annual average labour force growth of between 2.9% and 3.0% and would therefore appear to be reasonable on our assumption that a 3.0% labour force growth rate should be anticipated for the Halifax CMA. The difference between the second and third population projections in 1986 is less than 2% so that there is no particular reason to select one in preference to the other. However, in order to develop estimates of probable Halifax CMA and CBD land-use requirements in the following part of the report, it has been necessary to select one population projection; and we have therefore selected the third population projection which is derived from the Nowlan regional estimates to use as a base for the land-use projections which follow.

While the population projection which we have selected is somewhat lower than both the Dartmouth report (1965) projections and the Canadian-British Engineering projections of 1956, it nevertheless represents a challenging goal, if our assumption that defence services will stabilize is correct.

The table below adjusts the third projection to the Census years and indicates the numerical strength of the labour force at 40% of the population.

Halifax CMA - 1961-1986  
Population and Labour Force Projections

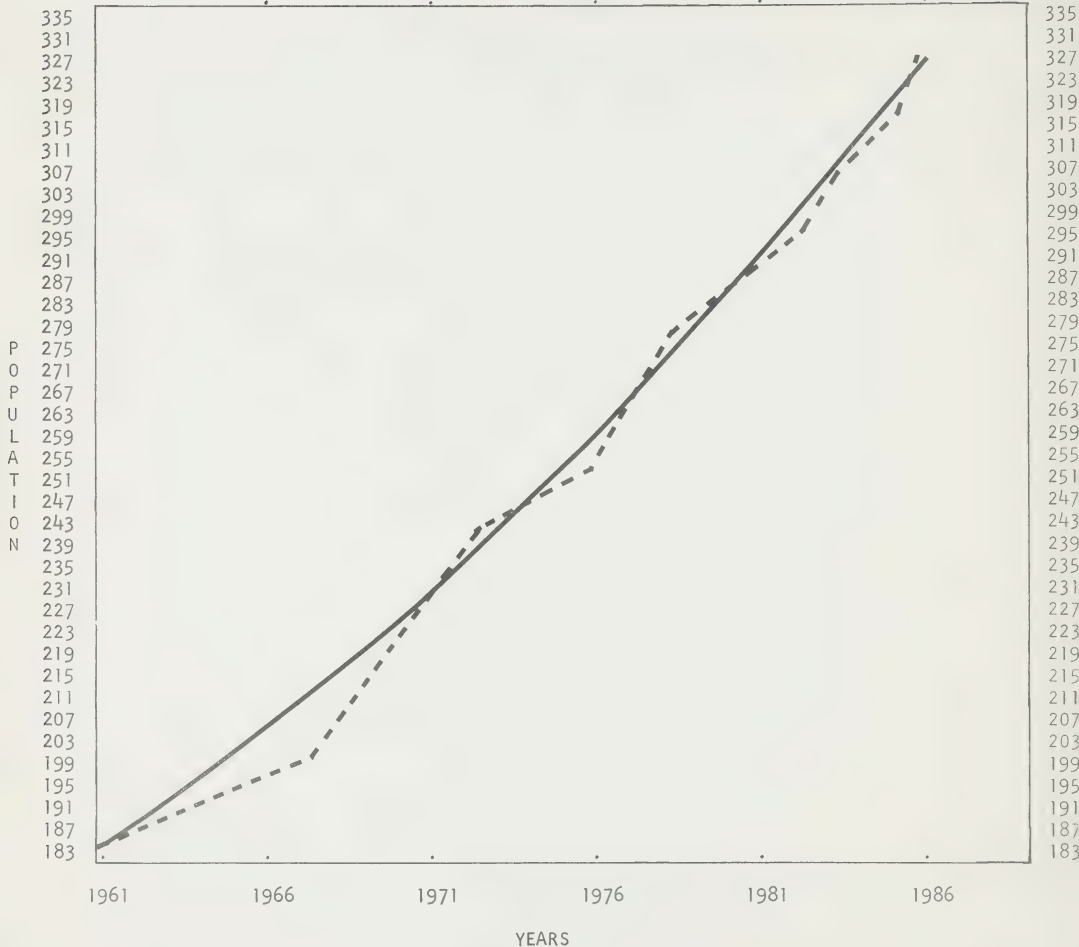
	<u>1961</u>	<u>1966</u>	<u>1971</u>	<u>1976</u>	<u>1981</u>	<u>1986</u>
Population	183,900	205,500	229,500	257,500	290,000	326,000
Labour Force	82,953	82,200	91,800	103,000	116,000	130,000

It should be stressed that neither the population nor the labour force projections are designed to reflect the typically cyclical nature of the





HALIFAX CMA - 1961-1986  
POPULATION PROJECTIONS



— Canadian Urban Economics Projection  
- - - Illustrative Population Growth

economic growth. As a result, the actual population growth in 1966 or 1971, for example, may be higher or lower than our projections for those years. The graph on the facing page indicates the manner in which actual population growth might follow the general trend of our projections without producing the same population figures for any given year.





PART III

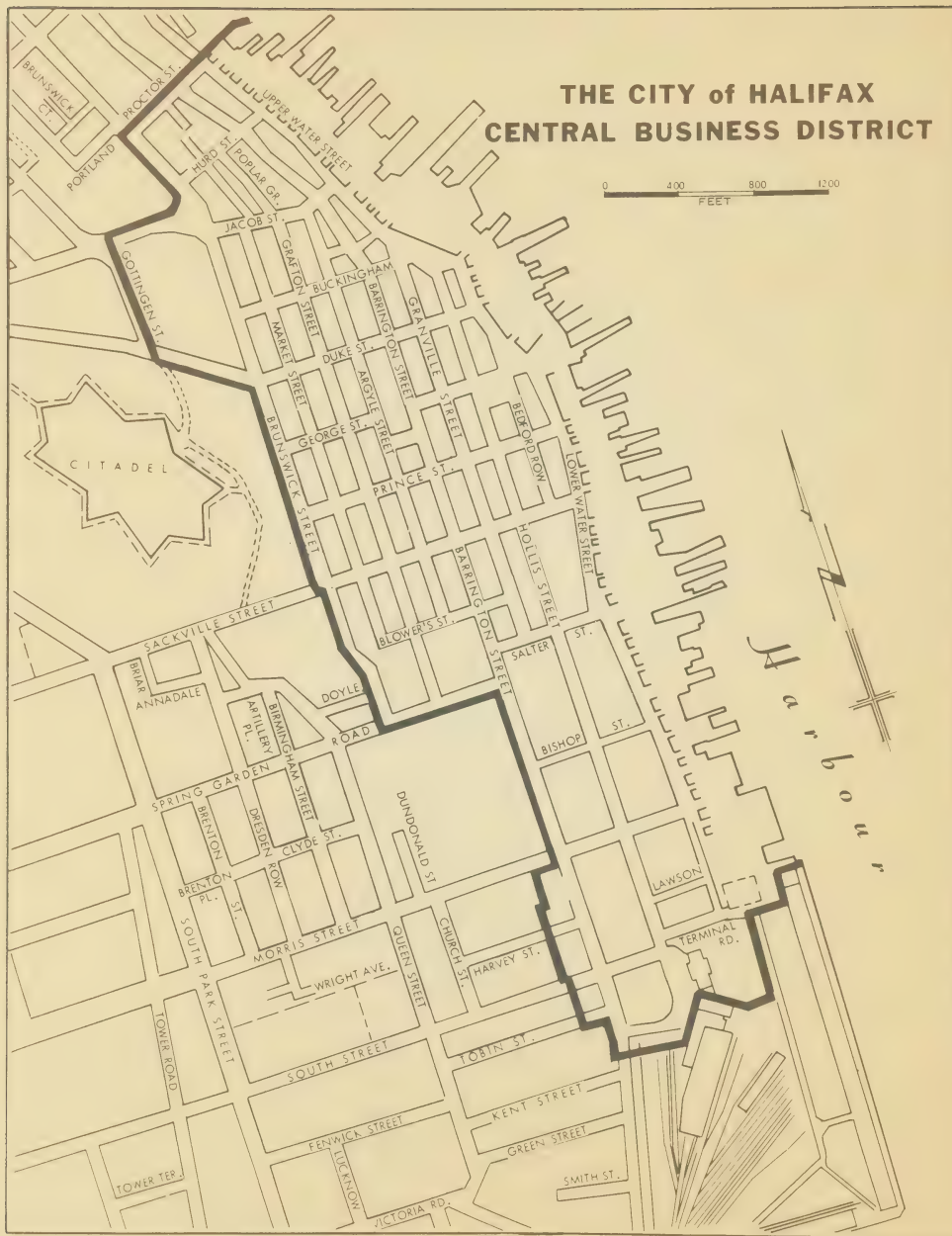
HALIFAX CENTRAL BUSINESS DISTRICT

LAND-USE REQUIREMENTS





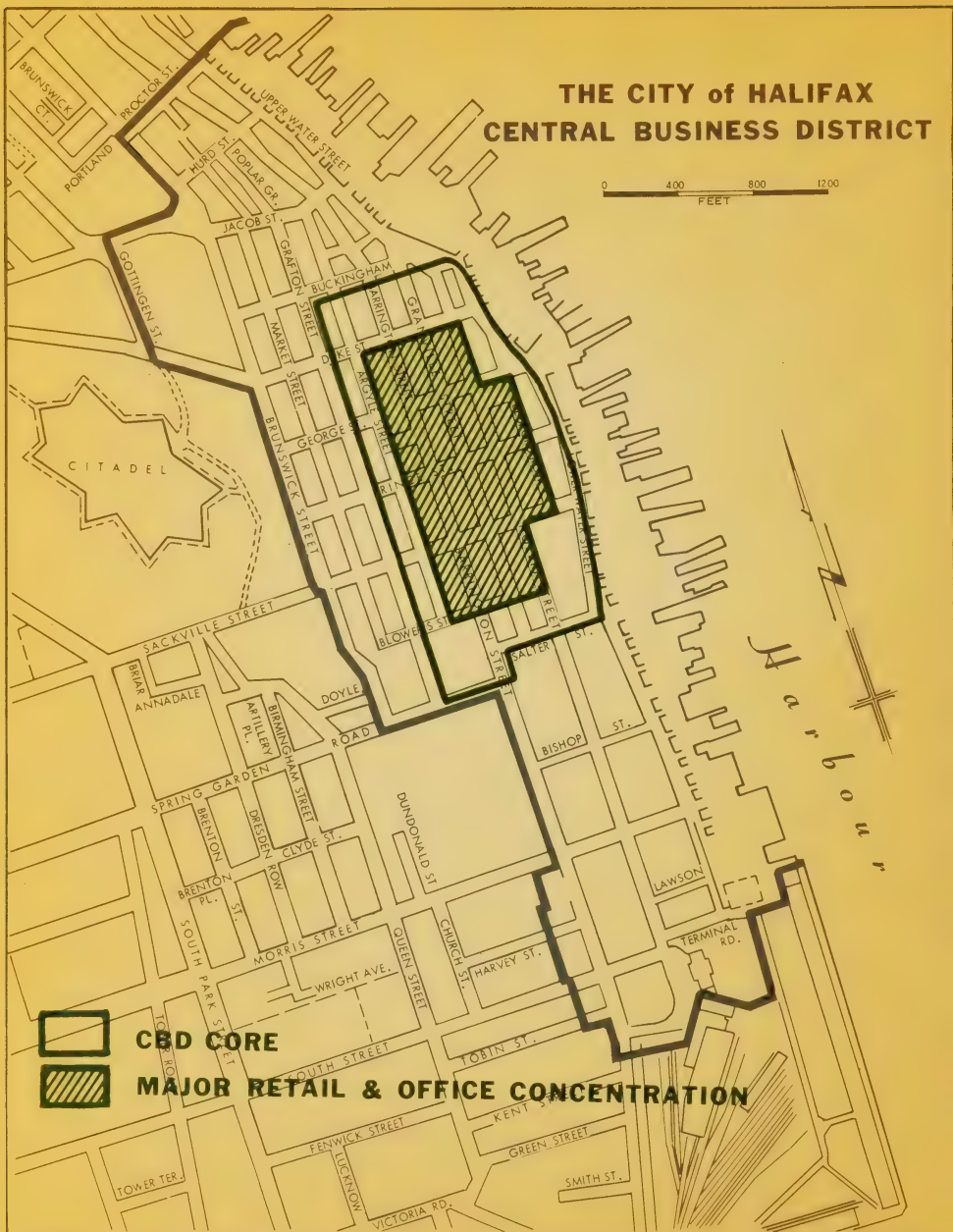
A horizontal scale bar labeled "FEET" with markings at 0, 400, 800, and 1200.



MAJOR RETAIL & OFFICE CONCENTRATION

CBD CORE





### PART III

#### INTRODUCTION

In the following part of the report, additional space or unit requirements are projected for selected land uses within the Halifax CBD. The Halifax CBD (see map opposite) is defined as the area bounded by Proctor Street on the north, the Citadel Hill and the Nova Scotia Technical College on the west, the Ocean Terminals to the south, and the harbour to the east. It contains approximately 181 acres in an area approximately  $1\frac{1}{2}$  miles long by  $\frac{1}{2}$  mile wide, which slopes fairly steeply towards the harbour. The core of the CBD as defined in the Draft Master Plan is the area bounded by Spring Garden Road, Grafton Street, Buckingham Street, and Water Street, with major retail and office land uses concentrated in the area bounded by Duke Street, Bedford Row and Hollis Street, Blower Street and Argyle Street. Surrounding this area is a fringe area of industrial, wholesale and warehousing uses which extends from Brunswick Street to the harbour between Buckingham Street and Spring Garden Road. North of the fringe, the area is largely cleared and currently used for temporary parking, while south of the fringe the land use is predominately low-end residential with mixed land uses interspersed. At the southern limit of the area, the Nova Scotian Hotel and the Imperial Oil Building provide the focal points.

It is our intention in the following paragraphs to identify those land uses which should, in our opinion, be particularly considered for inclusion in the Halifax CBD. Having identified the suitable land uses, we will then, in the following sections, examine each suitable land use in turn, first from the standpoint of total estimated Halifax CMA space or unit requirements, and then with respect to estimated Halifax CBD space or unit requirements.

The table below which is taken from the City of Halifax Draft Master Plan indicates the interrelationship of present Halifax CBD land uses:

	<u>Acreage</u>	<u>Percentage of Total Area</u>
Industry & Warehousing	49.6	27.3%
Commercial - Shops & Offices	17.8	9.7
Residential (Predominant Use)	9.9	5.6
Hotels	9.5	5.2
Government	9.2	5.1
Institutions, Churches, Schools, Library	4.9	2.7
Clubs & Entertainment	3.7	2.0
Open Space	3.2	1.7
Parking Lot	1.8	1.0
Parking Garages	0.9	0.5
Streets	51.7	28.6
Vacant Land	19.3	10.6
Total	<u>181.5</u>	<u>100.0%</u>





Examining the various land uses which make up the content of the Halifax CBD and drawing upon our experience in the central business districts of other major urban areas, it is our opinion that an economic analysis of the Halifax CBD should be principally concerned with residential, office, and retail land uses. Ancillary uses such as cultural and commercial recreational facilities, institutional land uses, and parking facilities, which tend to complement and round out the principal CBD land-use ingredients should also be considered.

While industrial land uses, including warehouse and wholesale uses, presently account for some 27.3% of the CBD area, most of these uses are separated from the core of the CBD and concentrated between Water Street and the harbour (notable exceptions to this general observation are Moirs Ltd. and the Halifax Herald Ltd.). Industrial use of CBD land tends to concentrate in fringe CBD locations because of the high land values typically generated by commercial and office uses in the CBD core. Because of the limited area in which major commercial and office uses are presently concentrated within the Halifax CBD, it is reasonable to anticipate that growth of these land uses will result in an expansion of the CBD core area in the years ahead.

As these primary CBD land uses spread into the balance of the CBD, the higher land values generated by more intensive land use will probably result in a move by some CBD industries to the suburbs.

Certain of the light industrial land uses, and in particular the warehouse and wholesaling industries, derive substantial benefits from CBD locations and may be expected to maintain fringe CBD locations, concentrated between Water Street and the harbour. We would anticipate that, as a result of changing land-use patterns in the Halifax CBD, industrial land use within the CBD will diminish as some industry moves to non-CBD locations, while the wholesale and warehouse sectors consolidate activities in purpose-built and more efficient CBD fringe locations.

Under the circumstances, while suggesting that there will be a gradual reduction in the amount of CBD land occupied by industry, it is not our intention to examine industrial growth from a CMA standpoint since projected industrial land-use growth in the Halifax CMA will not, in our opinion, provide any indication of the probable industrial land-use requirements for the Halifax CBD.

Insofar as appropriate CBD land uses are concerned, each is dealt with in turn in the following sections. The current inventory is estimated, and projections made of the probable cumulative CMA and CBD space requirements to the year 1986. The land-use classifications used by us for the purposes of this report have been somewhat modified to suit the land-use



inventory data which were available to us. The land-use classifications in the order in which we have dealt with them are as follows:

1. Residential
  - a. Single Family
  - b. Multifamily
2. Retail
  - a. Retail Stores
  - b. Service Retail (i.e., barber shops, beauty shops, restaurants, etc.)
3. Offices
  - a. Medical/Dental
  - b. Nongovernment
  - c. Government
4. Transient Housing (hotels and motels)
5. Other Uses
  - a. Commercial Recreational
  - b. Institutional
  - c. CBD Parking





HALIFAX CMA

HOUSING CHARACTERISTICS 1961

Occupied Dwellings by Type

	Grand Total	Single Detached	Single Attached			Apartments or Flats			Mobile *
			Total	Double		Total	Duplex	Other	
				House	Other				
Halifax City	21,501	8,883	2,731	1,372	1,359	9,887	3,540	6,347	126
Dartmouth	10,945	6,665	575	312	263	3,579	1,612	1,967	247
CMA	42,366	23,450	3,789	2,025	1,764	14,880	5,903	8,977	

\* Less than 100.

Occupied Dwellings by Tenure, Length of Occupancy and Residential Use

	Tenure		Length of Occupancy					Residential Use			
	Total	Owned	Rented	Less Than 1 Year	1-2 Years		3-5 Years	6-10 Years	More Than 10 Years	Residential Only	Residential & Business
					Years	Years					
Halifax City	21,501	10,006	11,495	3,740	3,479	3,986	3,343	6,953	20,221	1,280	
Dartmouth	10,945	6,415	4,530	2,577	2,386	2,327	1,600	2,055	10,487	458	
CMA	42,366	23,234	19,132	8,230	7,684	8,593	6,521	11,338	40,492	1,874	

Occupied Dwellings by Period of Construction and Condition of Building

	Total	Period of Construction				Condition of Building		
		Before 1920	1920-1945		1946-1959	Good	Minor Repair	Major Repair
			1920-1945	1946-1959				
Halifax City	21,501	10,482	5,913	4,854	252	15,844	4,130	1,527
Dartmouth	10,945	1,997	2,243	6,070	635	8,538	1,968	439
CMA	42,366	13,338	10,846	16,734	1,448	31,560	8,145	2,661

## SECTION I

### RESIDENTIAL

#### Introduction

In the following section of this report, Halifax CMA dwelling characteristics are examined, and the number of additional dwelling units required to house the projected Halifax CMA population increases is estimated. In order to project the total new dwelling unit requirements for the Halifax CMA, estimates are made of the extent to which existing dwelling units will require replacement and of the average number of vacant dwelling units that are likely to be available from time to time. Having estimated the total number of new dwelling units required, recent trends in dwelling unit construction are examined for the Halifax CMA and a selected group of other Canadian metropolitan areas, and an estimate is made of the percentage of total dwelling unit construction which is likely to be composed of apartment and row housing dwelling units.

On the assumption that any residential development within the Halifax CBD will be of the multifamily (apartment or row housing) variety, an estimate is then made of the extent to which multifamily residential development should be planned for the Halifax CBD.

It should be stressed that this section on residential requirements is concerned with private rather than government-sponsored developments. Future low rental or subsidized housing projects like the Uniacke Square development are not therefore taken into consideration, and our projections of additional single family and multifamily requirements exclude units of this type which may be developed to replace existing housing.

#### Halifax CMA Dwelling Unit Requirements

A number of sources contain information on the Halifax CMA housing stock. Basic information for the year 1961 has been taken from the DBS Census statistics of that year and these data have been supplemented by reference to annual CMHC statistics and to the Halifax Region Housing Survey which was prepared by H. S. Coblentz and published in May of 1963.

The first table on the opposite page shows occupied dwellings by type as reported for Halifax City, Dartmouth, and the Halifax CMA in 1961. In the second and third tables, tenure, length of occupancy, residential use, and the period of construction and condition of buildings are shown for the occupied dwelling inventory.





Having determined the occupied dwelling inventory for a given year, a number of factors must be considered in projecting the total number of dwelling units which will be required in a given area in the future. The basic factor is, of course, population. Using the population projections arrived at in the previous part of this report, future dwelling unit requirements can be estimated by adjusting the ratio between population and number of occupied dwelling units to reflect current trends and by adding factors to account for vacant dwelling units (which are always on the market) and the probable rate of replacement of existing dwelling units. The projected dwelling unit requirements can then be broken down between single family and multi-family housing on the basis of established and estimated future trends.

Since population projections have already been completed, the first influencing factor to be considered is the ratio between population and number of occupied dwelling units. The total number of occupied dwelling units in the Halifax CMA in 1961 (42,366) which housed a population of 183,946 (4.3 persons per occupied dwelling unit) compares with a 1951 inventory of 29,640 (4.5 persons per occupied dwelling unit) and a 1956 inventory of 37,171 (4.4 persons per occupied dwelling unit). These population-to-dwelling-unit ratios compare with other metropolitan areas of Canada, and Canada itself, as follows:

Persons Per Occupied Dwelling Unit  
Selected CMA's 1951-1961

	<u>1951</u>	<u>1956</u>	<u>1961</u>
Halifax	4.5	4.4	4.3
Hamilton	3.8	3.8	3.8
Kitchener	3.9	3.7	3.7
London	3.7	3.6	3.6
Montreal	4.2	4.0	3.8
Toronto	4.1	4.0	3.8
Canada	4.1	4.1	4.0

The range in the number of persons per occupied dwelling unit runs from 3.6 (London 1956) to 4.2 (Montreal 1951). All of the selected metropolitan areas exhibited a gradual reduction in persons per dwelling unit during the 1951-1961 decade. As disposable incomes and standards of living increase, it is reasonable to assume that the trend towards fewer persons per occupied dwelling unit will continue.

For purposes of this report, we have assumed that the number of persons per occupied dwelling unit in the Halifax CMA will decline to 4.2 by 1971 and 4.1 by 1981. The table following indicates the number of



occupied dwelling units that will be required to house the projected Halifax CMA population at the declining rate in number of persons per occupied dwelling.

Halifax CMA 1961-1986

	<u>Cumulative Number of Occupied Dwelling Units Required</u>					
	<u>1961</u>	<u>1966</u>	<u>1971</u>	<u>1976</u>	<u>1981</u>	<u>1986</u>
Population	183,946	205,500	229,500	257,500	290,000	326,000
Average Persons Per Occupied DU*	4.3	4.3	4.2	4.2	4.1	4.1
Number of Occupied DU's Required	42,366	47,790	54,642	61,309	70,731	79,512

\* Dwelling Unit

The second influencing factor to be considered is the average number of dwelling units that are likely to be unoccupied in the Halifax CMA at any given time. Both single family and multifamily dwelling unit construction tend to be cyclical. In a typical cycle the residential housing market moves from periods when a shortage of competitive dwelling units exists, into periods of dwelling unit construction which typically continue until the available market is somewhat overbuilt. The rate of dwelling unit construction then declines until a shortage of units again exists, when the cycle is repeated. Because of the impossibility of forecasting the cycles in residential construction, and in any event because the cycles do not necessarily occur for all types of housing at the same time, it is not practical to attempt to reflect the cyclical nature of the market in the vacancy factor which we use. We have, therefore, employed a constant vacancy factor of 5% (which our experience would indicate is reasonable for planning purposes) to arrive at the total number of dwelling units which will be required (not including replacement) during the period of our projections.





# HALIFAX CMA 1961

## OCCUPIED DWELLINGS BY PERIOD OF CONSTRUCTION SHOWING SPECIFIED DWELLING ATTRIBUTES

Period of Construction	Total	Average Number of Rooms per Dwelling	Dwellings in Need of Major Repair	Dwellings with		
				Running Water	Bath or Shower (exclusive Use)	Flush Toilet (exclusive Use)
All Dwellings -	42,366	5.1	2,661	40,913	35,245	34,991
Before 1920	13,338	5.0	1,842	13,002	9,263	9,520
1920 - 1945	10,846	5.4	529	10,309	9,217	9,042
1946 - 1959	16,734	5.1	280	16,202	15,385	15,085
1960 - 1961	1,448	5.1	*	1,400	1,380	1,344

SOURCE: 1961 Census of Canada, Vol. 22.

\* Less than 100, figures not available.

# HALIFAX CMA 1961

## OCCUPIED DWELLINGS BY TYPE AND TENURE SHOWING PERIOD OF CONSTRUCTION, LENGTH OF OCCUPANCY, AND CONDITION OF DWELLING

Type of Dwelling and Tenure	Total	Period of Construction				Dwellings in Need of Major Repair
		Before 1920	1920-1945	1946-1959	1960-1961	
All Dwellings	42,366	13,338	10,846	16,734	1,448	2,661
Owned	23,234	4,986	7,263	9,982	1,003	894
Rented	19,132	8,352	3,583	6,752	445	1,767
Single Detached	23,450	4,180	7,737	10,578	955	1,063
Owned	19,372	3,103	6,379	8,976	914	721
Rented	4,078	1,077	1,358	1,602	*	342
Single Attached	3,789	2,551	587	614	*	442
Owned	1,452	984	260	197	*	*
Rented	2,337	1,567	327	417	*	366
Apartment or Flat	14,880	6,607	2,522	5,330	421	1,146
Owned	2,178	899	624	607	*	*
Rented	12,702	5,708	1,898	4,723	373	1,059

SOURCE: 1961 Census of Canada, Vol. 2.2.

\* Less than 100, figures not available.

### Halifax CMA 1961-1986

#### Cumulative Number of Dwelling Units Required

	<u>1961</u>	<u>1966</u>	<u>1971</u>	<u>1976</u>	<u>1981</u>	<u>1986</u>
Occupied Dwelling Units	42,366	47,790	54,642	61,309	70,731	79,512
5% Vacancy Factor	<u>2,230</u>	<u>2,515</u>	<u>2,876</u>	<u>3,227</u>	<u>3,723</u>	<u>4,185</u>
Total Dwelling Units	44,596	50,305	57,518	64,536	74,454	83,697

The final factor which must be considered in order to arrive at the total number of dwelling units which will be required in the Halifax CMA during the projection period is the extent to which the existing inventory will require replacement as a result of demolition or conversion to nonresidential use. While there is no way of estimating the extent to which competitive dwelling units will be converted to nonresidential use, a number of indices is available to assist us in estimating the probable extent to which the current housing stock will require replacement as a result of obsolescence and demolition.

The tables opposite indicate the period of construction of occupied dwellings within the Halifax CMA, the number of dwellings in need of major repair, and the number of dwelling units which contain the sort of conveniences which are nowadays considered standard. The second table indicates type of tenure and length of occupancy and provides a breakdown between single-detached, single-attached, and apartment-type dwelling units. A number of significant statistics is available from the tables. In the first place, the number of occupied dwellings reported in need of major repair in 1961 (2,661) is substantially less than the 1951 figure of 4,050. The improvement in the number of occupied dwellings requiring major repair is accounted for as follows:

### Halifax CMA

#### Change in Inventory of Occupied Dwellings Requiring Major Repair (1951-1961)

	<u>1951</u>	<u>1961</u>	<u>Numerical Change</u>
Halifax	2,490	1,527	(- 963) <sup>(1)</sup>
Dartmouth	410	439	29
Fringe Areas	1,150	695	(- 455)
CMA	4,050	2,661	(-1,389)





Of the total occupied dwelling unit stock in 1961, 32% was constructed before 1920 and 57% prior to 1946. As might be expected, having regard to the manner in which the Halifax CMA has developed, 78% of the occupied dwellings constructed prior to 1920 is located within the City of Halifax itself. It is interesting to note that approximately 43% of the occupied dwelling units requiring major repair is apartments rather than single attached or detached houses.

The tables also indicate that some 1,453 (3.4%) of the occupied dwellings within the Halifax CMA do not have running water, while 1,121 (16.8%) and 7,375 (17.4%), respectively, do not have exclusive use of a bath or shower or a flush toilet. The age and condition of the inventory and the degree to which it incorporates reasonable amenities provide some indication of the extent to which existing units may require replacement in the years ahead. It is impossible to be definitive about the rate at which replacement will occur. However, having regard to the above-noted statistics and bearing in mind that they do not reflect obsolescence or need of repair in unoccupied dwelling units, it would be our opinion that local authorities within the CMA should anticipate replacement of the 1961 housing stock at an average rate of 2% per year, with most of the replacement occurring within the City of Halifax itself. Of course, actual figures for any given year may be substantially higher or lower and can be significantly influenced upward by clearance connected with renewal programmes. The table below adjusts the projected total number of dwelling units by the replacement factor and then, by subtracting the estimated 1961 dwelling unit inventory, indicates cumulatively the number of new dwelling units which will be required in the Halifax CMA during the period 1961 to 1986.

#### Halifax CMA 1961-1986

	<u>Total Cumulative Number of Dwelling Units Required</u>					
	<u>1961</u>	<u>1966</u>	<u>1971</u>	<u>1976</u>	<u>1981</u>	<u>1986</u>
Total DU's	44,596	50,305	57,518	64,536	74,454	83,697
Replacement @ 2%						
1961 Inventory Per						
Annum	<u>          </u>	<u>4,460</u>	<u>4,460</u>	<u>4,460</u>	<u>4,460</u>	<u>4,460</u>
	44,596	54,765	61,978	68,996	78,914	88,157
Less 1961						
Inventory	<u>          </u>	<u>44,596</u>	<u>44,596</u>	<u>44,596</u>	<u>44,596</u>	<u>44,596</u>
Total Cumulative						
DU's Required	<u>    --    </u>	<u>10,169</u>	<u>17,382</u>	<u>24,400</u>	<u>34,318</u>	<u>43,561</u>



### Projected Multifamily Dwelling Unit Requirements

Having estimated the total number of new dwelling units required, we will examine recent trends in dwelling starts in the Halifax CMA and in other Canadian metropolitan centres in order to identify the extent to which apartments rather than single dwellings may fill the need for additional dwelling units within the Halifax CMA.

The tables in Appendix B show the percentage of the occupied dwellings stock which was made up of apartments in 1951 and 1961, and the dwelling starts by type for selected metropolitan areas for the period 1958 to 1964. Of the selected metropolitan areas, Montreal had the highest percentage of apartments in its occupied dwellings stock (51% in 1961, excluding duplexes) while St. John's had the lowest percentage. The average share of apartments in selected CMA's in 1961 was 20.1%, while the average excluding Montreal (whose apartment representation is abnormally high) was 15.7%. The Halifax CMA with 21.2% of apartments (excluding duplexes) in 1961, would therefore appear at that time to have been well represented by apartments in its total housing stock.

The table showing the percentage which apartment starts were of total dwelling starts in the period 1958 to 1964 indicates the marked trend towards a rapidly increasing percentage of apartment starts, including row housing, in urban areas. Dwelling starts in the Halifax CMA contained 30.9% of apartments in 1958, and this percentage had risen to 62.6% in 1964. There is every indication that a high percentage of apartment starts will continue into the immediate future.

In our opinion, it would be reasonable for planning purposes to project multifamily dwelling unit construction at an average of 50% of total dwelling unit requirements during the period covered by this report. The breakdown between types of additional dwelling units would, therefore, be as follows:

#### Halifax CMA 1966-1986

	<u>Cumulative Dwelling Unit Requirements</u> (by type)				
	<u>1966</u>	<u>1971</u>	<u>1976</u>	<u>1981</u>	<u>1986</u>
Total Dwelling Units	10,169	17,382	24,400	34,318	43,561
Apartment and Row Housing @ 50%	5,084	8,691	12,200	17,159	21,780



### Projected Multifamily Unit Demand - Halifax CBD

With respect to CBD residential land-use requirements, it is reasonable to assume that any developments will be of the multifamily variety. Present residential accommodation within the CBD is almost entirely of the two- and three-storey dwelling type and houses a population which was estimated at 3,500 in the Draft Master Plan.

During our field survey, it was noted that no new residential construction is apparent within the CBD. Most of the existing dwelling units are concentrated in the southern end of the CBD and would appear to be generally in fair to poor condition. Currently, the major multifamily development within the Halifax CMA is located in the area of the Halifax Shopping Centre. Recent major multifamily construction has taken place in the Spring Garden Road, South Park Street area where some 800 new multifamily dwelling units will have been added to the housing stock when the major South Park Street development is completed. While the new construction will probably satisfy the immediate need for relatively expensive multifamily accommodation, there would appear to be little in the way of modern multifamily accommodation in the general downtown area for the middle and lower-middle income group.

Generally speaking, the equity requirements for single family home ownership and the maintenance and management problems involved, when not offset by the need to provide children with the comparative freedom which is available in single family accommodation, makes multifamily accommodation particularly attractive to single persons, young couples without children, and the elderly. Because of increasing commuter transportation problems and crowded traffic arteries from suburbs to downtown areas, recent years have seen a substantial increase in multifamily developments within the downtown areas of our larger cities. People without children who either work in the downtown or who are retired and wish to be convenient to downtown facilities constitute the major source of demand for this type of close-in accommodation, while families with children constitute a more limited source of demand, frequently because of the lack of adequate school facilities within the downtown area.

While commuter problems in the Halifax CMA do not compare with the problems apparent in Toronto or Montreal for example, the suburbs are pushing out further and further from the central city and the time spent commuting from the suburbs can be expected to constitute a growing factor in the demand for multifamily accommodation conveniently located to the downtown area.

Having regard to the foregoing, it would be our opinion that the CBD and CBD fringe area could absorb 25% of the additional Halifax CMA multifamily unit requirements during the period covered by our



projections, assuming that a satisfactory environment for multifamily development in the CBD can be established.

Halifax CBD and Fringe Cumulative Additional Multifamily Unit Requirements (1966-1986)					
	<u>1966</u>	<u>1971</u>	<u>1976</u>	<u>1981</u>	<u>1986</u>
Halifax CMA Cumulative Multifamily Unit Requirements	5,084	8,691	12,200	17,159	21,780
Halifax CBD & Fringe @ 25%	1,271	2,173	3,050	4,289	5,445

It should be noted that, although under given circumstances a relatively accurate projection of apartment demand can be made for a specific location, the degree to which the Halifax CBD will develop as a location for multifamily units depends largely on the following:

1. The actual redevelopment achieved in the Halifax CBD and the provisions made for apartment areas.
2. The ability of developers to assemble appropriate parcels of land in the central area at a cost which will enable reasonable rentals to be charged.
3. A favourable and cooperative attitude on the part of the Halifax City Council towards such developments.

It is difficult to evaluate the degree of success that particular types of multifamily development will enjoy in a metropolitan area such as Halifax. Unique new apartment developments may to a greater or lesser degree create their own demand regardless of current trends within the market. However, the economics of locating multifamily units in a central location suggest that serious consideration should be given to the development of major high-rise multifamily structures in the downtown area. This opinion is further supported by recent experiences in Toronto and other major cities in Canada.





## SECTION II

### RETAIL TRADE

This section of the report presents a general evaluation of the Halifax CMA\*retail market and projects future Halifax CMA retail space requirements to the year 1986. Having projected CMA retail space requirements, the Halifax CBD\*retail role is examined in the context of the Halifax CMA market. After considering alternative retail development possibilities for the Halifax CBD, an estimate of CBD retail space requirements is made based upon our best judgment as to the probable rate of retail growth within the CBD.

#### Halifax CMA Retail Trade Area

For purposes of this report, we have defined the trade area of the Halifax CMA as the Halifax CMA itself. Because of the concentration of population within the CMA and the relatively sparse population in the balance of Halifax County, it is in our opinion reasonable to assume that not more than 5% to 7% of the retail sales reported for the Halifax CMA are made to residents of the nonmetropolitan portion of the county. While we appreciate the fact that some retail sales are made from the Halifax CMA to visitors from other urban areas, the considerable travelling distances involved would tend to work against extensive retail sales by Halifax CMA retail facilities to visitors from beyond the boundaries of Halifax County. Under the circumstances, we have assumed that not more than a total of 15% of the Halifax CMA retail sales is made to transients or to customers who reside beyond the limits of the Halifax CMA and make occasional shopping trips to Halifax. This additional volume of retail sales from outside the CMA should not be considered as a specific added factor since, in our experience, it tends to be offset at least in part by the retail expenditures which trade area residents make outside their trade area.

#### Retail Categories

For analytical purposes, retail facilities have been grouped in the following categories:

1. Comparison goods category. In this category are included all general merchandise outlets (i.e., department stores and variety stores); apparel, shoe, and dry good stores; household furniture and appliance stores; and the specialty store group (i.e., jewelry, luggage, sporting goods, musical instruments, etc.). The category is called "comparison goods" because it generally includes all retail stores which market the type of merchandise for which the customer will typically travel the greatest distance in order to shop and compare price, quality, and style of merchandise before selecting an item to be purchased.

---

\* It will be recalled that the Halifax CMA is the Census metropolitan area which includes Halifax, Dartmouth, and the suburbs while the Halifax CBD is the central business district of the City of Halifax and is contained between the waterfront on the east, the Citadel on the west, Proctor Street on the north, the Nova Scotian Hotel to the south.





# 1961 RETAIL SALES\*

## HALIFAX CMA

	Halifax CMA 1961 Retail Sales (000's)	Retail Sales Per Capita Halifax CMA (Population 183,946)	Nova Scotia	Canada
<u>Comparison Goods</u>				
General Merchandise	\$ 35,592.8	\$ 193		
Apparel/Accessories	14,398.6	78		
Furniture/Appliances	9,552.2	52		
Other	<u>7,642.2</u>	<u>42</u>		
Subtotal	\$ 67,185.8	\$ 365	\$243	\$277
<u>Convenience Goods</u>				
Food	\$ 53,330.8	\$ 290		
Drug	5,709.2	31		
Hardware	1,602.6	9		
Beer/Liquor	<u>11,251.5</u>	<u>61</u>		
Subtotal	\$ 71,894.1	\$ 391	\$292	\$316
<u>Other Retail</u>				
Automotive	\$ 52,740.0	\$ 287		
Miscellaneous	<u>7,954.6</u>	<u>43</u>		
Subtotal	\$ 60,694.6	\$ 330	\$252	\$288
<b>TOTAL</b>	<u>\$199,774.5</u>	<u>\$1,086</u>	<u>\$787</u>	<u>\$881</u>

SOURCE: 1961 Retail sales data from Vol. 6.1, 1961 Census of Canada.  
For basis of calculation, see text on page 45.

# HALIFAX CMA

## PER CAPITA RETAIL SALES - 1961-1986\*

	<u>1961</u>	<u>1966</u>	<u>1971</u>	<u>1976</u>	<u>1981</u>	<u>1986</u>
<u>Comparison Goods</u>						
General Merchandise	\$ 193	\$ 202	\$ 213	\$ 222	\$ 232	\$ 241
Apparel/Accessories	78	82	86	90	94	98
Furniture/Appliances	52	55	57	60	62	65
Other	<u>42</u>	<u>44</u>	<u>46</u>	<u>48</u>	<u>50</u>	<u>52</u>
Subtotal	\$ 365	\$ 383	\$ 402	\$ 420	\$ 438	\$ 456
<u>Convenience Goods</u>						
Food	\$ 290	\$ 305	\$ 319	\$ 334	\$ 348	\$ 363
Drug	31	33	34	36	37	39
Hardware	9	9	10	10	11	11
Beer/Liquor	<u>61</u>	<u>64</u>	<u>67</u>	<u>70</u>	<u>73</u>	<u>76</u>
Subtotal	\$ 391	\$ 411	\$ 430	\$ 450	\$ 469	\$ 489
<u>Other Retail</u>						
Automotive	\$ 287	\$ 301	\$ 316	\$ 330	\$ 344	\$ 359
Miscellaneous	<u>43</u>	<u>45</u>	<u>47</u>	<u>49</u>	<u>52</u>	<u>54</u>
Subtotal	\$ 330	\$ 346	\$ 363	\$ 379	\$ 396	\$ 413
TOTAL	<u>\$1,086</u>	<u>\$1,140</u>	<u>\$1,195</u>	<u>\$1,249</u>	<u>\$1,303</u>	<u>\$1,358</u>

SOURCE: 1961 Retail sales data from Vol. 6.1, 1961 Census of Canada.

\* For basis of calculations, see text on page 45.







HALIFAX CMA

PROJECTED RETAIL VOLUME POTENTIAL - 1961-1986  
(000's)

	<u>1961</u>	<u>1966</u>	<u>1971</u>	<u>1976</u>	<u>1981</u>	<u>1986</u>
Population	183,946	205,500	229,500	257,500	290,000	326,000
<u>Comparison Goods</u>						
General Merchandise	\$ 35,592.8	\$ 41,511.0	\$ 48,883.5	\$ 57,165.0	\$ 67,280.0	\$ 78,566.0
Apparel/Accessories	14,398.6	16,851.0	19,737.0	23,175.0	27,260.0	31,948.0
Furniture/Appliances	9,552.2	11,302.5	13,081.5	15,450.0	17,980.0	21,190.0
Other Comparison	<u>7,642.2</u>	<u>9,042.0</u>	<u>10,557.0</u>	<u>12,360.0</u>	<u>14,500.0</u>	<u>16,952.0</u>
Subtotal	\$ 67,185.8	\$ 78,706.5	\$ 92,259.0	\$ 108,150.0	\$ 127,020.0	\$ 148,656.0
<u>Convenience Goods</u>						
Food	\$ 53,330.8	\$ 62,677.5	\$ 73,210.5	\$ 86,005.0	\$ 100,920.0	\$ 118,338.0
Drug	5,709.2	6,781.5	7,803.0	9,270.0	10,730.0	12,714.0
Hardware	1,602.6	1,849.5	2,295.0	2,575.0	3,190.0	3,586.0
Beer/Liquor	<u>11,251.5</u>	<u>13,152.0</u>	<u>15,376.5</u>	<u>18,025.0</u>	<u>21,170.0</u>	<u>24,776.0</u>
Subtotal	\$ 71,894.1	\$ 84,460.5	\$ 98,685.0	\$ 115,875.0	\$ 136,010.0	\$ 159,414.0
<u>Other Retail</u>						
Automotive	\$ 52,740.0	\$ 61,855.5	\$ 72,522.0	\$ 84,975.0	\$ 99,760.0	\$ 117,034.0
Miscellaneous	<u>7,954.6</u>	<u>9,247.5</u>	<u>10,786.5</u>	<u>12,617.5</u>	<u>15,080.0</u>	<u>17,604.0</u>
Subtotal	\$ 60,694.6	\$ 71,103.0	\$ 83,308.5	\$ 97,592.5	\$ 114,840.0	\$ 134,638.0
TOTAL	<u>\$199,774.5</u>	<u>\$234,270.0</u>	<u>\$274,252.5</u>	<u>\$321,617.5</u>	<u>\$377,870.0</u>	<u>\$442,708.0</u>

SOURCE: 1961 figures from Vol. 6.1, 1961 Census of Canada.

2. Convenience goods category. This category includes food, drug, hardware, and liquor and beer stores. The type of merchandise carried does not normally result in comparison shopping, and the customer therefore typically shops at the neighbourhood store which is usually located convenient to the local population which supports it.
3. "Other" retail category. In the other retail category we have included all retailers of automotive products including service stations, parts and accessory shops, motor vehicle dealers, and motor vehicle repair shops, together with fuel and fuel oil dealers, motor cycle dealers, and ice dealers.
4. Service retail category. This group, which is dealt with separately at the end of this section, includes the wide variety of personal and other services which is normally available in an urban area. While the group is defined in detail elsewhere in the report, it includes barber and beauty shops, laundry and dry cleaning establishments, and eating and drinking facilities.

#### Halifax CMA Per Capita Sales - Actual and Projected

The table opposite the preceding page sets out the retail sales reported for the Halifax CMA for the year 1961 and indicates per capita sales by store type. For comparison purposes, the per capita sales for the Province of Nova Scotia and for Canada are shown for each of the three major categories. The variation in sales per capita between the Halifax CMA, Nova Scotia, and Canada follows the same pattern as exists with respect to per capita wages and salaries with the Halifax CMA at the high point, followed by Canada and then the Province of Nova Scotia.

In order to project total sales by store type in the table on the preceding page, we have increased per capita sales by 1% per year to reflect the probable effects of inflational economic trends and the anticipated increase in real income levels. By applying our population projections to the estimated per capita expenditures by store type, the table opposite estimates retail expenditures to 1986. Our projections indicate an increase in total retail sales of approximately 122% in the 25 years between 1961 and 1986, or an average annual increase of approximately 4.9%.

In order to convert projected dollar sales into estimates of space requirements for the various store types, it is necessary firstly to establish average retail per square foot sales levels applicable to the Halifax CMA. It should be stressed at the outset that the per square foot sales levels which we project as being reasonable for the Halifax CMA are not intended to reflect either maximum physical capacity of given store types or actual sales levels for particular stores but, rather, the average level for each store type within the complete spectrum of the Halifax CMA retail market.





HALIFAX CMA

TOTAL RETAIL SPACE REQUIREMENTS - 1966-1971  
(000's Sq. Ft.)

	<u>Per Sq.Ft. Sales Levels</u>	<u>1966</u>	<u>1971</u>	<u>1976</u>	<u>1981</u>	<u>1986</u>
<u>Comparison Goods</u>						
General Merchandise	\$ 40.00	1,037.8	1,222.1	1,429.1	1,682.0	1,964.2
Apparel/Accessories	\$ 60.00	280.8	328.9	386.2	454.3	532.5
Furniture/Appliances	\$ 35.00	322.9	373.7	441.4	513.7	605.4
Other	\$ 75.00	120.5	140.8	164.8	193.3	226.0
Total		<u>1,762.0</u>	<u>2,065.5</u>	<u>2,421.5</u>	<u>2,843.3</u>	<u>3,328.1</u>

Convenience Goods

Food	\$120.00	522.3	610.1	716.7	841.0	986.1
Drug	\$ 55.00	123.3	141.8	168.5	195.1	231.2
Hardware	\$ 35.00	52.8	65.6	73.6	91.1	102.4
Beer/Liquor	\$300.00	43.8	51.2	60.0	70.6	82.6
Total		<u>742.2</u>	<u>868.7</u>	<u>1,018.8</u>	<u>1,197.8</u>	<u>1,402.3</u>

Other Retail

Automotive	\$ 70.00	883.6	1,036.0	1,214.0	1,425.1	1,671.9
Miscellaneous	\$ 45.00	205.5	239.7	280.4	335.1	391.2
Total		<u>1,089.1</u>	<u>1,275.7</u>	<u>1,494.4</u>	<u>1,760.2</u>	<u>2,063.1</u>

SOURCE: 1961 Retail sales data from Vol. 6.1, 1961 Census of Canada.

Although there will have been some increase in retail sales in the Halifax CMA since 1961, and some adjustment in retail store space, a broad estimate of actual sales levels can be obtained by comparing the current inventory of retail space with retail sales as reported by DBS for 1961. On this basis, actual sales levels for the Halifax CMA would appear to fall within the following ranges:

Halifax CMA

Actual Sales Levels

	<u>Sales Levels (\$ Per Square Foot of Total Store Area)</u>
Comparison Goods	\$ 41 - \$ 44
Convenience Goods	\$106 - \$114
Other Retail	\$ 67 - \$ 72

Having regard to current sales levels in the Halifax CMA and to our experience in other areas, we have assumed the following average sales levels for the Halifax CMA:

Halifax CMA

Average Sales Levels

	<u>Sales Levels (\$ Per Square Foot of Total Store Area)</u>
Comparison Goods	\$ 45
Convenience Goods	\$114
Other Retail	\$ 65

The table on the opposite page estimates total space requirements by store type by applying the average per square foot sales levels to the estimates of total sales.

Halifax CMA Retail Inventory

Having estimated total retail space requirements for the Halifax CMA, cumulative additional space requirements can be estimated by subtracting the current CMA retail inventory. The map opposite the following page indicates major retail areas and shopping centres (including the proposed Penhorn Mall shopping centre) within the boundaries of the Halifax metropolitan area.







Legend
<p> <b>Water</b>            Blue            Shaded Blue            Dark Blue            Light Blue            Very Light Blue            White            Yellow            Orange            Red            Brown            Green            Dark Green            Black         </p>
<p> <b>Land</b>            White            Yellow            Orange            Red            Brown            Green            Dark Green            Black         </p>
<p> <b>Buildings</b>            Black            Grey            White            Yellow            Orange            Red            Brown            Green            Dark Green            Black         </p>
<p> <b>Streets</b>            Black            Grey            White            Yellow            Orange            Red            Brown            Green            Dark Green            Black         </p>
<p> <b>Railways</b>            Black            Grey            White            Yellow            Orange            Red            Brown            Green            Dark Green            Black         </p>
<p> <b>Other</b>            Black            Grey            White            Yellow            Orange            Red            Brown            Green            Dark Green            Black         </p>

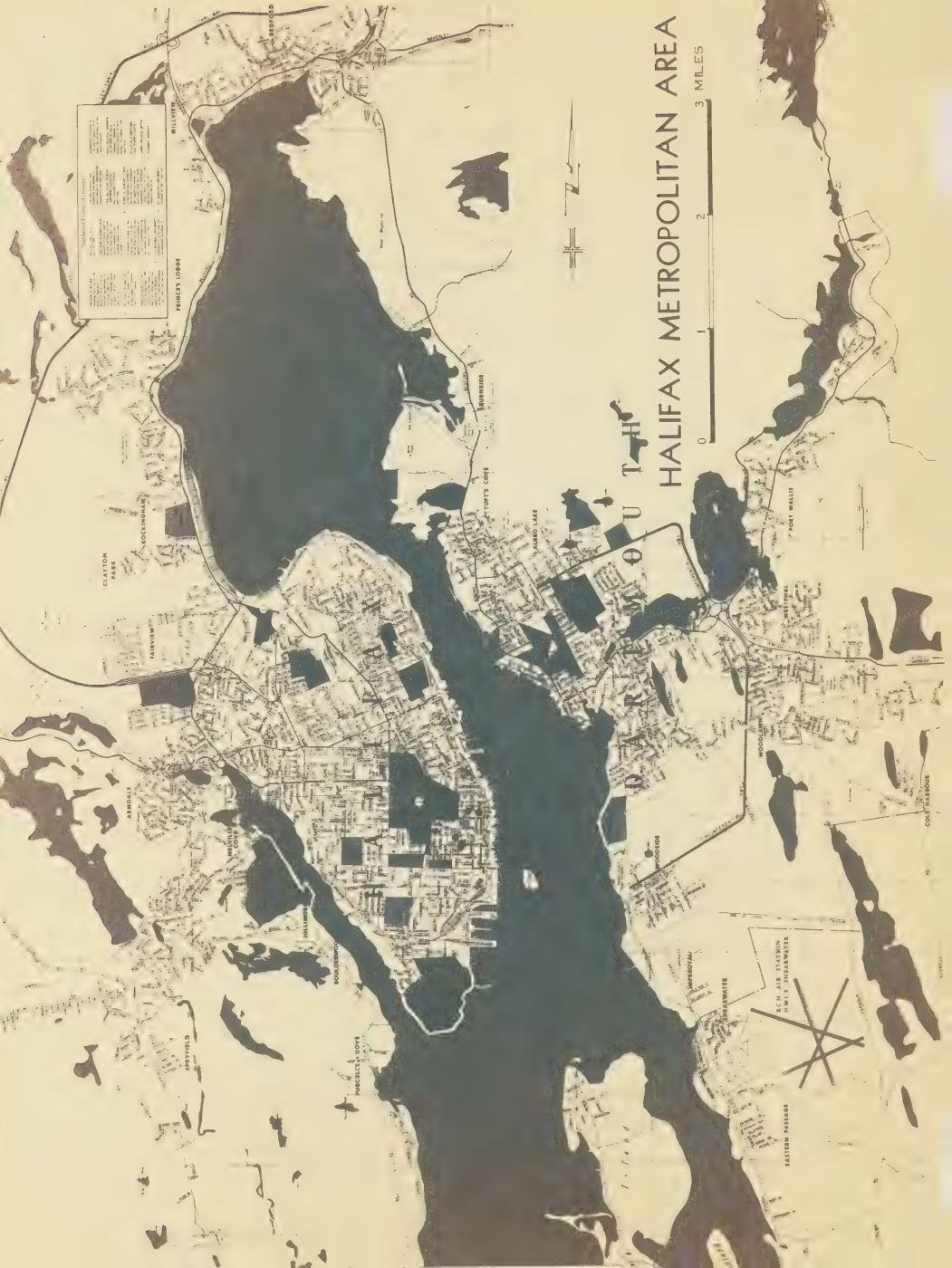
PRINCE 1984



HALIFAX

# HALIFAX METROPOLITAN AREA

0 1 2 3 MILES



MAJOR RETAIL AREAS





An inventory of major retail areas was conducted by Canadian Urban Economics in March, 1965, and comparison and convenience retail space in the major retail areas was estimated as follows: (Numbers rounded to nearest 1,000.)

	<u>Square Feet</u>
CBD	300,000
Gottingen Street	215,000
Spring Garden Road	95,000
Quinpool Road	55,000
Halifax Shopping Centre	288,000
Simpsons-Sears Shopping Centre	126,000*
Bayers Road Shopping Centre	123,000
Dartmouth	<u>311,000</u>
 Total	 <u>1,513,000</u>

\* Excludes warehouse and mail order facilities.

Because of the extent to which convenience and "other" retail space (which includes by definition all of the automotive space) is scattered throughout the Halifax CMA, it was impractical to attempt to take inventory of all retail facilities within the metropolitan area. However, based upon an examination of available retail sales data, we would estimate the total retail inventory for the Halifax CMA at approximately 3,000,000 square feet.

Examining the major retail areas within the CMA, the Halifax CBD retail facilities would appear to have been reduced by approximately 125,000 square feet since our previous inventory of major retail areas which was taken in 1958. Most of the reduction results from the move by The T. Eaton Co. Limited from downtown to the Halifax Shopping Centre and the smaller amount of space occupied by Woods department store after its move from premises on Granville Street to Barrington and Prince Streets. The present retail content of the CBD is made up of a high concentration of fur and jewellery stores, a wide range of shoe and apparel facilities, a good quality furniture store, and a quantity of variety store space.

In the area of the Halifax Shopping Centre, The T. Eaton Co. Limited and Simpsons-Sears are located on opposite properties and represent some 275,000 square feet of department store space. This space is supported by an additional 138,000 square feet of other retail stores in the Halifax Shopping Centre for a total retail inventory of approximately 413,000 square feet. The older Bayers Road Shopping Centre, which is anchored by a food supermarket and variety store, provides additional retail strength to this general area in the Halifax CMA.







HALIFAX CMA

CUMULATIVE ADDITIONAL RETAIL  
SPACE REQUIREMENTS - 1966-1986  
(000's Sq.Ft.)

	1965 Estimated Inventory	<u>1966</u>	<u>1971</u>	<u>1976</u>	<u>1981</u>	<u>1986</u>
<u>Comparison Goods</u>						
General Merchandise	1,015.9	21.9	206.2	413.2	666.1	948.3
Apparel/Accessories	300.9	--	28.0	85.3	153.4	231.6
Furniture/Appliances	245.9	77.0	127.8	195.5	267.8	359.5
Other	<u>91.6</u>	<u>28.9</u>	<u>49.2</u>	<u>73.2</u>	<u>101.7</u>	<u>134.4</u>
Subtotal	1,654.3	127.8	411.2	767.2	1,189.0	1,673.8
<u>Convenience Goods</u>						
Food	450.0	72.3	160.1	266.7	391.0	536.1
Drug	100.0	23.3	41.8	68.5	95.1	131.2
Hardware	50.8	2.0	14.8	33.8	40.3	51.6
Beer/Liquor	<u>36.7</u>	<u>7.1</u>	<u>14.5</u>	<u>23.3</u>	<u>33.9</u>	<u>45.9</u>
Subtotal	637.5	104.7	231.2	381.3	560.3	764.8
<u>Other Retail</u>						
Automotive	750.0	133.6	286.0	464.0	675.1	921.9
Miscellaneous	<u>150.0</u>	<u>55.5</u>	<u>89.7</u>	<u>130.4</u>	<u>185.1</u>	<u>241.2</u>
Subtotal	900.0	189.1	375.7	594.4	860.2	1,163.1
TOTAL	<u>3,191.8</u>	<u>421.6</u>	<u>1,018.1</u>	<u>1,742.9</u>	<u>2,609.5</u>	<u>3,601.7</u>

SOURCE: 1961 Retail sales data from Vol. 6.1, 1961 Census of Canada.

Additional major retail concentrations with the City of Halifax are located on Quinpool Road (where the retail space is predominantly of the convenience goods type), Gottingen Street (which contains a fairly broad cross section of comparison and convenience goods), and Spring Garden Road (where better class ladies' apparel and other specialty stores appear to have concentrated).

In the City of Dartmouth, the most significant retail area will be in Westphal/Woodlawn, once the Penhorn Mall Shopping Centre is open. The K-Mart and Woolco stores will represent some 200,000 square feet of space supported by additional retail space within the two shopping centres and the Sobey Centre which adjoins the K-Mart site.

The Portland Street and Commercial Street retail area, while containing some 70 retail and service stores, does not have a significant amount of competitive major retail space. This area functions in a somewhat similar capacity to the Gottingen Street retail area which principally serves the residents of the areas adjoining it. The other major retail area is located in the Dartmouth Shopping Centre (which is strategically placed at the entrance of the Angus L. MacDonald bridge and has recently been expanded by the inclusion of additional retail space adjoining a new Sobey food supermarket). The Dartmouth Shopping Centre, like Bayers Road, is anchored by a food supermarket and a variety store and contains a broad range of other retail store types.

By subtracting the estimated Halifax CMA retail inventory of approximately 3,000,000 square feet from our projections of total retail space requirements, the table on the opposite page indicates estimated cumulative additional retail space requirements for the Halifax CMA for the period 1966 to 1986.

While a limited amount of demand for additional retail space can be identified for the year 1966, approximately 1,000,000 square feet of additional space could be absorbed by 1971, while total retail space needs should more than double during the 20 years covered by our projections.

#### Service Retail

The service retail category has been broken down into two sections: in the first, under "personal services," are included barber shops, beauty shops, laundry and dry cleaning establishments, shoe repair, and other personal services; while in the second, under "other services," we have included eating and drinking establishments, funeral, photographic, and other services.

The tables following show 1961 reported sales for each section. By dividing population into total sales, the 1961 per capita sales levels for personal services and other services are shown at the foot of the tables.







# HALIFAX CMA

## RETAIL SERVICES SPACE REQUIREMENTS - 1966-1986

	<u>1966</u>	<u>1971</u>	<u>1976</u>	<u>1981</u>	<u>1986</u>
Population	205,500	229,500	257,500	290,000	326,000
<u>Personal Services</u>					
Per Capita Sales	\$28	\$29	\$30	\$32	\$33
Sales Projection (000's)	\$ 5,754.0	\$ 6,655.5	\$ 7,725.0	\$ 9,280.0	\$10,758.0
Space Requirements @ \$35 Per Sq. Ft. (000's Sq.Ft.)	164.4	190.2	220.7	265.1	307.4
Less 1961 Inventory (000's Sq.Ft.)	<u>139.0</u>	<u>139.0</u>	<u>139.0</u>	<u>139.0</u>	<u>139.0</u>
Estimated Cumulative Additional Space Requirements (000's Sq.Ft.)	<u>25.4</u>	<u>51.2</u>	<u>81.7</u>	<u>126.1</u>	<u>168.4</u>

### Other Services

Per Capita Sales	\$79	\$83	\$87	\$90	\$94
Sales Projection (000's)	\$16,234.5	\$19,048.5	\$22,402.5	\$26,100.0	\$30,644.0
Space Requirements @ \$35 Per Sq. Ft. (000's Sq.Ft.)	463.8	544.2	640.1	745.7	875.5
Less 1961 Inventory (000's Sq.Ft.)	<u>396.1</u>	<u>396.1</u>	<u>396.1</u>	<u>396.1</u>	<u>396.1</u>
Estimated Cumulative Additional Space Requirements (000's Sq.Ft.)	<u>67.6</u>	<u>148.1</u>	<u>244.0</u>	<u>349.6</u>	<u>479.4</u>

NOTE: "Business Services" is included in "Office."

## RETAIL SERVICES TOTAL CUMULATIVE ADDITIONAL SPACE REQUIREMENTS (000's Sq.Ft.)

	<u>1966</u>	<u>1971</u>	<u>1976</u>	<u>1981</u>	<u>1986</u>
Personal Services	25.4	51.2	81.7	126.1	168.4
Other Services	<u>67.7</u>	<u>148.1</u>	<u>244.0</u>	<u>349.6</u>	<u>479.4</u>
TOTAL	<u>93.1</u>	<u>199.3</u>	<u>325.7</u>	<u>475.7</u>	<u>647.8</u>

SOURCE: 1961 Census of Canada.

1961 Per Capita Sales Levels  
(000's)

Population 183,946

Personal Services

Barber	\$ 548.0
Beauty	970.1
Dry Cleaning/Laundry	1,735.2
Shoe Repair	260.8
Other	<u>1,351.4</u>

Other Services

Eating/Drinking	\$ 8,985.8
Funeral Services	648.2
Photography	566.7
Other	<u>3,661.2</u>

Total \$4,865.5

Total \$13,861.9

Per Capita Sales \$26.45

Per Capita Sales \$75.35

SOURCE: 1961 Census of Canada, Vol. 6.2.

Assuming a rising level of per capita sales and at an estimated sales level of \$35 per square foot, total space requirements are estimated to the year 1986 in the tables on the opposite page. Again, because of the wide dispersal of retail service establishments throughout the Halifax CMA, no retail service inventory was available. However, by calculating the 1961 inventory at an assumed sales level of \$35 per square foot of reported sales, estimated additional space requirements have been shown.

Halifax CBD Retail Space Requirements

In the table following, the projected Halifax CMA retail additional space requirements are set out to the year 1986:

Cumulative Additional  
CMA Retail Space Projections - 1966-1986  
(Sq.Ft.)

	<u>1966</u>	<u>1971</u>	<u>1976</u>	<u>1981</u>	<u>1986</u>
Comparison Goods	127,800	411,200	767,200	1,189,000	1,673,800
Convenience Goods	104,700	231,200	381,300	560,300	764,800
Other Retail	189,100	375,700	594,400	860,200	1,163,100
Service Retail	<u>93,100</u>	<u>199,300</u>	<u>325,700</u>	<u>475,700</u>	<u>647,800</u>
Total	<u>514,700</u>	<u>1,217,400</u>	<u>2,068,600</u>	<u>3,085,200</u>	<u>4,249,500</u>

When analyzing the range of future opportunity for the Halifax CBD retail content in the light of estimated Halifax CMA retail space projections, it is important to note that the comparison goods facilities constitute the real core and strength of any major retail shopping area. Convenience retail and



service retail facilities typically develop around this basic comparison goods core in any major retail concentration, and depend upon the drawing power of the comparison goods facilities to create pedestrian movement and retail customer activity.

Within this context, in order to estimate CBD retail space requirements, the requirements for the total CMA must be considered in light of the estimated current distribution of the Halifax CMA retail facilities and anticipated areas of population growth. It may be recalled from the previous section of this report that the Halifax CMA comparison and convenience stores retail inventory is distributed among the major retail areas of the CMA as follows:

Halifax CMA  
Distribution of 1965 Retail Inventory\*

	<u>Sq. Ft.</u>	<u>Percent</u>
CBD	300,000	20%
Gottingen Street	215,000	14
Spring Garden Road	95,000	6
Quinpool Road	55,000	4
Halifax Shopping Centre	288,000	19
Simpsons-Sears Shopping Centre	126,000	8
Bayers Road Shopping Centre	123,000	8
Dartmouth	311,000	20
Total	<u>1,513,000**</u>	<u>99%</u>

\* Numbers rounded to nearest 1,000.

\*\* This inventory contains only comparison and convenience space in the major retail areas. An additional estimated 1,023,000 square feet of "other" retail and convenience space is scattered through the Halifax CMA.

It is apparent from these estimated percentage shares that the northwest area of the City of Halifax, with Simpsons-Sears, the Halifax Shopping Centre, and the Bayers Road Shopping Centre, contains more retail space than is available in the Halifax CBD, although somewhat less space than is contained in the Halifax CBD, Gottingen Street, and Spring Garden Road areas combined. The retail space in the shopping centres is, of course, relatively new, while the space in the downtown areas tends to be older and somewhat less attractively merchandised.

With respect to future population growth, while some growth will undoubtedly occur within the boundaries of the City of Halifax, it is anticipated that most of the projected population growth (142,000 additional people by 1986) will occur in the City of Dartmouth or in the Halifax/Dartmouth suburban areas. Under existing access conditions, the movement of people from the Dartmouth side of the harbour is largely by way of the Angus L. MacDonald

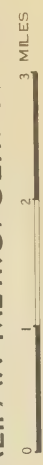








Legend	
1	Halifax City Limits
2	Halifax Regional Municipality
3	Other Municipalities
4	Water
5	Land
6	Highways
7	Railways
8	Canals
9	Islands
10	Mountains
11	Forests
12	Fields
13	Woods
14	Swamps
15	Marshes
16	Beaches
17	Ports
18	Harbors
19	Quays
20	Docks
21	Wharves
22	Warehouses
23	Factories
24	Offices
25	Residential
26	Commercial
27	Industrial
28	Government
29	Religious
30	Education
31	Health
32	Recreation
33	Utilities
34	Transportation
35	Communication
36	Defense
37	Other



# HALIFAX METROPOLITAN AREA



..... FERRY

— PROPOSED

— EXISTING ACCESS ROUTES

● M.W. HATLEAX SHOPPING CENTRE





bridge which connects with the City of Halifax some twelve blocks north of the Halifax CBD and offers a reasonably direct route to the northwest part of the City of Halifax. Traffic from the western suburbs enters the City of Halifax by the Armdale Rotary, Kempt Road, or Bayers Road, all of which routes provide fast and convenient access to the northwest area shopping centres (see map opposite). Future improvements in the highway system include the Narrows bridge (which, if built, will be further removed from the Halifax CBD), the North Arm bridge (which will improve access to the Halifax CBD from the west and southwestern suburbs), and Harbour Drive, (which is intended eventually to provide a limited-access highway from the Fairview overpass, around the northern end of the Halifax Peninsula to the City of Halifax CBD and eventually to be connected with the North Arm bridge). Despite the planned improvements in access, the Halifax CBD will continue to be relatively inconvenient for much of the present and future CMA population to reach, compared with existing and planned major shopping centres.

Because of the scarcity of land on the Halifax peninsula, new residential construction will tend to occur at ever-increasing distances from the central city. As a result of this movement away from the central city and because of basic changes in shopping habits and transportation during the past 25 years, it would appear that the trend toward development of suburban retail facilities is an irreversible one. Under the circumstances, the Halifax CBD retail facilities must anticipate increasing competition for Halifax metropolitan area retail consumer expenditures from new suburban developments which are typified by the proposed Penhorn Mall Shopping Centre.

During the week of March 22, customer surveys were conducted concurrently in a number of stores on Barrington Street and at the Halifax Shopping Centre in order to identify the points of origin of shoppers. The overlays to the map opposite the following page indicate the results of the surveys in graphic form, while a detailed analysis of survey results is contained in appendix A. The extremely wide drawing power of the Halifax Shopping Centre is apparent. It would also appear that the Halifax CBD retail influence is concentrated in the area south of Young Street and east of Connaught Avenue and that, even within this area, the influence of the Halifax Shopping Centre is considerable.

While meaningful sales statistics are not available for specific areas within the Halifax CMA, the available evidence would indicate that a reorientation of metropolitan area retail shopping habits towards suburban facilities and away from the Halifax CBD has taken place. It appears that the retail focal point of the Halifax CMA for comparison goods is currently the northwest area of the City of Halifax rather than the Halifax CBD. It is our opinion that this shift in the retail focal point for comparison goods will not be reversed by the probable pattern of retail development within the Halifax CMA in future years. This opinion is strengthened by the fact that even if the Halifax CBD were able to develop as much as 40% of the estimated Halifax CMA additional retail comparison goods space







**LEGEND**

Major Highways  
 Minor Highways  
 Railroads  
 Waterways  
 Parks  
 Cemeteries  
 Public Buildings  
 Churches  
 Schools  
 Hospitals  
 Airports  
 Industrial Areas  
 Residential Areas  
 Commercial Areas  
 Unimproved Land  
 Water  
 Swamps  
 Marshes  
 Forests  
 Parks  
 Cemeteries  
 Public Buildings  
 Churches  
 Schools  
 Hospitals  
 Airports  
 Industrial Areas  
 Residential Areas  
 Commercial Areas  
 Unimproved Land  
 Water  
 Swamps  
 Marshes  
 Forests



# HALIFAX METROPOLITAN AREA

0 1 2 3 MILES

CUSTOMER SURVEY  
HALLWAY SHOPPING CENTRE  
POINT of ORIGIN

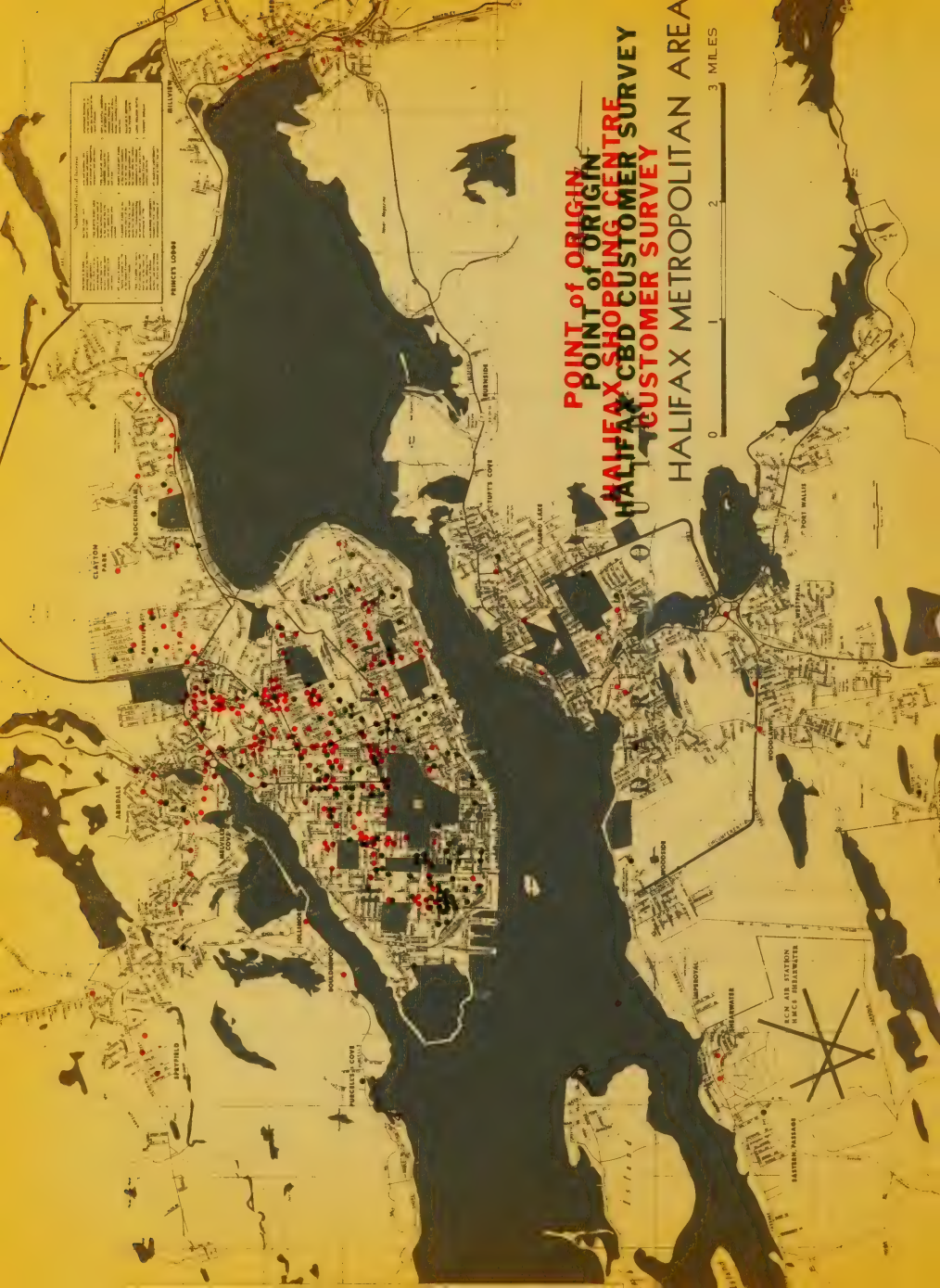




1. Point of Origin	2. Point of Origin	3. Point of Origin	4. Point of Origin	5. Point of Origin	6. Point of Origin	7. Point of Origin	8. Point of Origin	9. Point of Origin	10. Point of Origin	11. Point of Origin	12. Point of Origin	13. Point of Origin	14. Point of Origin	15. Point of Origin	16. Point of Origin	17. Point of Origin	18. Point of Origin	19. Point of Origin	20. Point of Origin	21. Point of Origin	22. Point of Origin	23. Point of Origin	24. Point of Origin	25. Point of Origin	26. Point of Origin	27. Point of Origin	28. Point of Origin	29. Point of Origin	30. Point of Origin	31. Point of Origin	32. Point of Origin	33. Point of Origin	34. Point of Origin	35. Point of Origin	36. Point of Origin	37. Point of Origin	38. Point of Origin	39. Point of Origin	40. Point of Origin	41. Point of Origin	42. Point of Origin	43. Point of Origin	44. Point of Origin	45. Point of Origin	46. Point of Origin	47. Point of Origin	48. Point of Origin	49. Point of Origin	50. Point of Origin	51. Point of Origin	52. Point of Origin	53. Point of Origin	54. Point of Origin	55. Point of Origin	56. Point of Origin	57. Point of Origin	58. Point of Origin	59. Point of Origin	60. Point of Origin	61. Point of Origin	62. Point of Origin	63. Point of Origin	64. Point of Origin	65. Point of Origin	66. Point of Origin	67. Point of Origin	68. Point of Origin	69. Point of Origin	70. Point of Origin	71. Point of Origin	72. Point of Origin	73. Point of Origin	74. Point of Origin	75. Point of Origin	76. Point of Origin	77. Point of Origin	78. Point of Origin	79. Point of Origin	80. Point of Origin	81. Point of Origin	82. Point of Origin	83. Point of Origin	84. Point of Origin	85. Point of Origin	86. Point of Origin	87. Point of Origin	88. Point of Origin	89. Point of Origin	90. Point of Origin	91. Point of Origin	92. Point of Origin	93. Point of Origin	94. Point of Origin	95. Point of Origin	96. Point of Origin	97. Point of Origin	98. Point of Origin	99. Point of Origin	100. Point of Origin
--------------------	--------------------	--------------------	--------------------	--------------------	--------------------	--------------------	--------------------	--------------------	---------------------	---------------------	---------------------	---------------------	---------------------	---------------------	---------------------	---------------------	---------------------	---------------------	---------------------	---------------------	---------------------	---------------------	---------------------	---------------------	---------------------	---------------------	---------------------	---------------------	---------------------	---------------------	---------------------	---------------------	---------------------	---------------------	---------------------	---------------------	---------------------	---------------------	---------------------	---------------------	---------------------	---------------------	---------------------	---------------------	---------------------	---------------------	---------------------	---------------------	---------------------	---------------------	---------------------	---------------------	---------------------	---------------------	---------------------	---------------------	---------------------	---------------------	---------------------	---------------------	---------------------	---------------------	---------------------	---------------------	---------------------	---------------------	---------------------	---------------------	---------------------	---------------------	---------------------	---------------------	---------------------	---------------------	---------------------	---------------------	---------------------	---------------------	---------------------	---------------------	---------------------	---------------------	---------------------	---------------------	---------------------	---------------------	---------------------	---------------------	---------------------	---------------------	---------------------	---------------------	---------------------	---------------------	---------------------	---------------------	---------------------	---------------------	----------------------

POINT of ORIGIN  
 POINT of ORIGIN  
 HALIFAX SHOPPING CENTRE  
 HALIFAX CBD CUSTOMER SURVEY  
 CUSTOMER SURVEY

HALIFAX METROPOLITAN AREA  
 0 1 2 3 MILES



requirements in 1966 or 1971 (a percentage share which we believe to be unrealistically high), the amount of additional comparison goods space developed in the Halifax CBD would be insufficient to enable the CBD to reestablish itself as the retail centre for the metropolitan area.

Under these circumstances, the basic CBD retail questions which must be resolved are:

1. The effect on current retail facilities in the Halifax CBD of a continuing nondominant role within the context of the Halifax CMA retail market.
2. The effect on the Halifax CBD generally of its nondominant regional retail content.
3. The feasibility of introducing a major retail development to the Halifax CBD.

1. The Effect on Current Retail Facilities. The present retail content of the CBD represents some 20% of the major retail facilities in the Halifax CMA. The CBD's percentage share of total space was substantially reduced when The T. Eaton Co. Limited relocated its facilities in the Halifax Shopping Centre after being unable to find a satisfactory way to expand its store in the CBD and by the subsequent move of Woods' department store from its premises on Granville Street to a portion of the original Eaton's premises. The loss of the major department store, together with the shift of the retail focal point from the Halifax CBD to the northwest area of Halifax has resulted in a period of readjustment for the retail content of the CBD and some additional retail space has been lost.

While some population loss has occurred in the area between Morris Street and Cornwallis Street east of the Citadel (population in this area dropped from 11,514 to 7,764 during the period 1941-1961), the population of that part of the City of Halifax which lies south of North Street and east of Robie Street (and is therefore generally adjacent to the CBD) actually increased by approximately 500 during the same period (1941-1961) so that population shifts within the City of Halifax downtown area would not appear to constitute a major factor in the readjustment of Halifax CBD retail content.

Even if the Halifax CBD were to continue in a nondominant retail role, it is our opinion that further deterioration or reduction in CBD retail content can be avoided. The period of CBD retail adjustment resulting from the loss of major facilities would appear to be over and, with competitive and aggressive merchandising, CBD retail merchants should be able to maintain present CBD retail sales volumes over the short run and look forward to a reasonable share of CMA sales volume increases in the years ahead.

Anticipated growth of the CBD labour force together with residential population growth within the CBD and CBD fringe will provide potential for steady



growth of CBD retail facilities. Moreover, tourists and visitors to the Halifax area and those residents of the region who are drawn downtown by cultural and entertainment facilities may be expected to provide an additional source of CBD retail sales. It should be stressed, however, that CBD retail potential will only be translated into actual sales as a result of the coordinated and concerted efforts of CBD retail merchants.

2. The Effect on the CBD Generally. There is some significance in the fact that the area which used to be known as "the downtown" has become "the central business district" in recent years. With increasing emphasis on suburban life and declining dominance of CBD retail facilities, the "business" role of the CBD has become its primary function. In observing the experience of other cities, there are successful central business districts which perform no significant retail function and others which have maintained a position of regional retail dominance, the majority of central business districts in North America have historically experienced a declining share of the metropolitan retail market in recent years.

The generally accepted concept of diversification of compatible land uses within the CBD continues to be valid, and a CBD without any significant retail content will inevitably lack the pedestrian movement and vitality which retail facilities sustain. However, it is not in our opinion vital to the continuing health of the Halifax CBD that it reestablish itself as the retail centre for the metropolitan area, providing it can maintain its dominance in government and nongovernment uses and retain a major share of the CBD-oriented institutional, entertainment, and cultural facilities. As we have pointed out, growth of the CBD labour force and growth of population within the CBD fringe will provide sufficient sources of demand that there will be a continuing potential for growth of the CBD retail content.

3. Feasibility of Major CBD Retail Development. Having regard to the present composition and location of Halifax CMA retail facilities and the trend towards suburban retail developments, it would be our opinion that development of major retail facilities, including a department store, in the Halifax CBD in the foreseeable future would involve considerable risk for the department store unless it were part of a major complex along the lines of that envisaged by the developers of the Cornwallis Centre. This opinion is based at least in part on the assumption that the department stores currently operating in the Halifax CMA would not consider establishing a CBD location, so that establishment of a department store in the CBD would require a new entry into the Halifax area. It is difficult at any time for a department store which is new to a particular market to break down the customer acceptance of its established competitors and to carve out for itself a reasonable share of the retail market. The method often used in recent years has been for the new entry to a market area to operate a discount store type of operation in order to offer an apparent alternative to the conventional department store.



Since the traditional image for the CBD retail content is one of quality merchandise and high-class specialty stores, a discount-type department store is, in our opinion, incompatible with this established role of the CBD retail facilities; and we would therefore not recommend that a discount-type department store be sought for inclusion within the CBD. In any event, assuming that a discount-type operation were not incompatible with other retail uses in the CBD, the general problem of gaining customer acceptance would be compounded by the substantial difficulties inherent in establishing a CBD operation in the face of the reorientation towards suburban retail facilities which has taken place in Halifax and the relative cost and inconvenience of providing the parking which is generally associated with a discount store type of operation.

As a part of a major complex along the lines of the relatively massive development which was planned for the Cornwallis Centre, the risks for a new department store establishing in the Halifax CBD would be substantially reduced. This is largely true because the very size of the development would tend to encourage success, assuming that key tenants could be secured. However, our basic concern is with the continuing strength of the Halifax CBD rather than the success of a particular store or development. In our opinion, the critical weakness in the massive development concept as applied to Halifax is that the size of facilities required to ensure success for the development would tend to overwhelm the other facilities within the Halifax CBD. We would anticipate that, if such a complex were to be developed, much of the space would be occupied by existing CBD tenants and that, while the complex itself might be successful from an economic standpoint, a very real possibility would exist that the balance of the CBD would tend to deteriorate.

If a dominant regional retailing role were essential to the continuing strength of the Halifax CBD, the risks involved in encouraging a relatively massive development for the CBD might perhaps be worth taking. In our opinion, this dominant retail role is not vital to the CBD, and the risks inherent in a large-scale self-contained complex within the CBD far outweigh the possible advantages which might accrue to the city from such a development.

Having regard to the foregoing, our allocation of estimated CMA retail space requirements for the CBD is modest. Referring to the table containing the estimate of Halifax CMA retail space requirements, it would be our opinion that the CBD master plan should make provision for the following amounts of additional retail space in the Halifax CBD in the years ahead.





CBD Cumulative Additional  
Retail Space Requirements  
(Sq. Ft.)

	<u>1966</u>	<u>1971</u>	<u>1976</u>	<u>1981</u>	<u>1986</u>
Comparison Goods @ 20%	25,500	82,300	153,400	238,000	335,000
Convenience Goods @ 5%	5,250	11,550	19,050	28,000	38,250
Other Retail @ 15%	28,400	56,400	89,200	129,000	174,600
Service Retail @ 10%	<u>9,310</u>	<u>19,930</u>	<u>32,600</u>	<u>47,600</u>	<u>64,780</u>
Total	<u>68,460</u>	<u>170,180</u>	<u>294,250</u>	<u>442,600</u>	<u>612,630</u>

The additional retail space requirements which we have projected for the Halifax CBD suggest a rate of growth which is attainable without the creation of any dramatic retail development within the Halifax CBD, providing CBD retail merchants pursue forceful and competitive marketing policies and assuming an increase in CBD residential population takes place and that satisfactory solutions to the problems of access to and parking within the CBD can be developed.

The real issue in many central business districts is the attitude of property owners and merchants themselves. Frequently, much can be done to improve the retail content of the central business district both with respect to physical plant and merchandising techniques. A coordinated plan for improvement of the CBD retail areas will require the cooperation of the city, the property owners, and the merchants and should have as its principal objective the general upgrading of CBD retail facilities to a level which would be more competitive with the standards set by modern suburban shopping centres.







**HALIFAX -  
DARTMOUTH**





11

11

11

11

11

11

**HALIFAX -  
DARTMOUTH**



**CMA MAJOR OFFICE SPACE**

# HALIFAX

*Corthes* **HALIFAX** **CMA** *Arm*



## SECTION III

### OFFICE SPACE

This section of the report examines the current office space inventory within the Halifax CMA, and analyzes the probable office space requirements for the CMA to the year 1986. Having regard to the current distribution of office space within the Halifax CMA, and probable areas of growth, future additional Halifax CBD office space requirements are then estimated. In analyzing office space requirements, we have relied upon the inventory information contained in the 1964 Draft Master Plan as qualified and adjusted by the City of Halifax Planning Department, and upon information obtained from commercial realtors in Halifax (with respect to commercial space) and local members of government administration at the federal and provincial levels (for government space requirements).

Because of a lack of inventory information covering medical and dental office space in the Halifax CMA and covering all types of office space in that portion of the Halifax CMA which is outside the City of Halifax, it has been necessary to make some estimates in order to arrive at the basic CMA office space inventory. Our field survey of the Halifax CMA indicated that a very insubstantial amount of office space is located outside the City of Halifax. As is indicated by the map opposite, with the exception of the office space in the area of the Dartmouth Shopping Centre, the new municipal building on Dutch Village Road, the new Dartmouth City Hall, and the office building currently under construction on Portland Street in Dartmouth, there is little evidence of suburban office development of any significance. Under the circumstances, we would estimate that not more than 10% of the CMA office space is located outside the boundaries of the City of Halifax.

The major office space inventory information in the Draft Master Plan is broken down between government and nongovernment (also referred to as commercial or private) office space. Our analysis, while making the same general breakdown, adds the additional category of medical and dental office space since this type of space typically represents a different type of demand than other private or nongovernment space. The table following shows the estimated 1964 office space inventory for the Halifax CMA in the 3 categories of medical/dental, nongovernment, and government office space.



# HALIFAX CMA 1964

## ESTIMATED OFFICE SPACE INVENTORY (Sq. Ft.)

	<u>Area</u>	<u>Office Space Per Capita**</u>	<u>Percentage</u>
Medical/Dental*	202,500	1.1	9%
Nongovernment (Less Medical/Dental)	1,475,000	8.0	62%
Government (All levels)	<u>695,700</u>	<u>3.8</u>	<u>29%</u>
TOTAL	<u>2,373,200</u>	<u>12.9</u>	<u>100%</u>

\* Estimated at 750 square feet per doctor and dentist in active private practice.

\*\* Based on 1964 DBS Halifax CMA population estimate of 184,000.

### Projected Office Space Demand

Medical/Dental Office Space. The Royal Commission on Health Services report gives the 1961 physician-to-population ratio for Canada at 1:857 and the dentist-to-population ratio at 1:3,108. Halifax, by comparison, reported 338 physicians for a physician-population ratio of 1:544 and 65 dentists for a ratio of 1:2,946. The 1964 telephone directory for Halifax lists 205 physicians and surgeons and 65 dentists. For purposes of estimating the current medical office space inventory, we have assumed that the number of physicians in active private practice is reflected by the telephone directory listings rather than the Health Commission statistics since the Health Commission statistics include all physicians whether in private practice or not. On this assumption, the physician-to-population ratio for physicians in private practice in the Halifax CMA is 1:900.

One of the principal concerns of the Royal Commission was to identify ways in which present ratios could be maintained in the face of projected population increases. It was pointed out that, without major expansion of teaching facilities, the Canadian ratios would rise to 1:980 for physicians and 1:3,437 for dentists by 1986.

The estimated number of doctors and dentists in private practice in the Halifax CMA appears reasonable having regard to the averages reported for Canada. Because of its dominant position as a regional centre for health







HALIFAX CMA

ADDITIONAL CUMULATIVE MEDICAL OFFICE SPACE REQUIREMENTS 1966-1986

	<u>1966</u>	<u>1971</u>	<u>1976</u>	<u>1981</u>	<u>1986</u>
Population	205,500	229,500	257,500	290,000	326,000
Physicians @ 1:900 persons	228	255	286	322	362
@750 Sq. Ft. per physician	171,000	191,250	214,500	241,500	271,500
Less 1964 Inventory* (sq. ft.)	<u>153,750</u>	<u>153,750</u>	<u>153,750</u>	<u>153,750</u>	<u>153,750</u>
TOTAL (sq. ft.)	<u>17,250</u>	<u>37,500</u>	<u>60,750</u>	<u>87,750</u>	<u>117,750</u>

\* Based on estimate of 205 physicians in active private practice in 1964 occupying an average of 750 square feet each.

ADDITIONAL CUMULATIVE DENTAL OFFICE SPACE REQUIREMENTS 1966 - 1986

	<u>1966</u>	<u>1971</u>	<u>1976</u>	<u>1981</u>	<u>1986</u>
Population	205,500	229,500	257,500	290,000	326,000
Dentist @ 1:2,900 persons	71	79	89	100	112
@ 750 Sq. Ft. per dentist	53,200	59,200	66,800	75,000	84,000
Less 1964 Inventory* (sq. ft.)	<u>48,750</u>	<u>48,750</u>	<u>48,750</u>	<u>48,750</u>	<u>48,750</u>
TOTAL (sq. ft.)	<u>4,450</u>	<u>10,450</u>	<u>18,050</u>	<u>26,250</u>	<u>35,250</u>

\* Based on estimate of 65 dentists in active practice in 1964 occupying an average of 750 square feet each.

COMBINED MEDICAL/DENTAL  
ADDITIONAL CUMULATIVE PRIVATE OFFICE SPACE REQUIREMENTS 1966 - 1986  
(Sq. Ft.)

	<u>1966</u>	<u>1971</u>	<u>1976</u>	<u>1981</u>	<u>1986</u>
Physicians	17,250	37,500	60,750	87,750	117,750
Dentists	<u>4,450</u>	<u>10,450</u>	<u>18,050</u>	<u>26,250</u>	<u>35,250</u>
TOTAL	<u>21,700</u>	<u>47,950</u>	<u>78,800</u>	<u>114,000</u>	<u>153,000</u>

care and the existence of the medical and dental faculties at Dalhousie University, it would be our opinion that the Halifax CMA should be able to maintain its present physician and dentist-to-population ratios in the future; and our projections have therefore been made on the assumption that the existing ratios will not change.

It has been our experience that a doctor or a dentist in private practice requires approximately 750 square feet of private office space. On this basis, the current inventory of medical/dental office space has been calculated, and the cumulative space requirements are shown in the tables opposite based upon the number of doctors and dentists that we estimate will be in active private practice in the Halifax CMA during the period covered by our projections.

Nongovernment (Private or Commercial) Office Space. At the present time, all major nongovernment office structures in the Halifax CMA are located in the City of Halifax downtown area (including Spring Garden Road). The estimated inventory of 1,475,000 square feet is high compared with other cities of similar size. Based upon 1961 population, private office space in the Halifax CMA amounts to some 8 square feet per capita which compares with a typical range of 4-6 square feet for metropolitan areas containing populations in the 200,000 to 500,000 range, and 8-12 square feet per capita for major cities like New York, Toronto and Montreal. There are, of course, exceptions to the general rule, (the Ottawa metropolitan area for example with a population of approximately 500,000 had approximately 7.7 square feet of nongovernment office space per capita in 1964).

The atypical amount of nongovernment office space available in the Halifax CMA results largely from the dominant position of Halifax as the major business and administrative centre of the Atlantic Provinces. The fact that only approximately 4% of the office space in the Halifax CBD was vacant in 1964 is an indication that demand for nongovernment office space has remained high. Assuming that the dominant position of Halifax can be maintained, it is reasonable to anticipate that the ratio of nongovernment office space to population will increase in the future as tenants of obsolescent space move into new buildings (where they will typically occupy more space per capita) and as the percentage of office workers in the labour force continues to increase. The table facing the following page estimates the nongovernment office space requirements for the Halifax CMA for the period 1966 to 1986, based upon projected population increases and allowing for an increase of space per capita from 8 square feet in 1966 to 9 square feet in 1986.

Because of the age and general obsolescence of a large percentage of the nongovernment office inventory, the amount of new office construction should increase substantially over our projections as a result of replacement of existing facilities. The Draft Master Plan indicates that only 215,000 square feet of nongovernment office space has been constructed in the Halifax CBD since 1951. At the present time, the pace of nongovernment





HALIFAX CMA

ADDITIONAL CUMULATIVE NONGOVERNMENT  
OFFICE SPACE REQUIREMENTS 1966 - 1986

	<u>1966</u>	<u>1971</u>	<u>1976</u>	<u>1981</u>	<u>1986</u>
Population	205,500	229,500	257,500	290,000	326,000
Space Per Capita (Sq.Ft.)	8.0	8.0	8.5	8.5	9.0
Total Square Feet	1,644,000	1,836,000	2,189,000	2,465,000	2,934,000
Less 1964 Inventory (Sq.Ft.)	<u>1,475,000</u>	<u>1,475,000</u>	<u>1,475,000</u>	<u>1,475,000</u>	<u>1,475,000</u>
Additional Space Required (Sq.Ft.)	<u>169,000</u>	<u>361,000</u>	<u>714,000</u>	<u>990,000</u>	<u>1,459,000</u>

office development in Halifax would appear to be quickening; and as new office accommodation becomes available, the vacancy rate in obsolescent space will tend to increase as tenants upgrade by moving into modern facilities.

Government Office Space. The following table provides a breakdown of the 1964 inventory of government office space between the three levels of federal, provincial, and local government:

<u>HALIFAX CMA (1964)</u>			
<u>GOVERNMENT OFFICE SPACE INVENTORY</u>			
(Sq. Ft.)			
		<u>Space Per Capita</u>	<u>%</u>
Federal Government	332,000	1.8	48%
Provincial Government	225,000	1.2	32%
Local Government*	<u>138,700</u>	<u>.8</u>	<u>20%</u>
TOTAL	<u>695,700</u>	<u>3.8</u>	<u>100%</u>

\* Estimated

The local Federal Government administration, which occupies some 48% of the CMA government office space, has steadily increased in size in recent years. In 1958, the Ralston building was constructed to take care of Federal Government space needs. Despite the approximately 163,000 square feet of space made available at that time, the expanding number of Federal Government office employees has necessitated construction of an additional 65,000 square feet of space in the Sir John Thompson building on Barrington Street. We are advised that this additional space is already fully committed to various Federal Government departments so that, by the time the building is ready for occupancy, there will be no uncommitted space available for future expansion. The rising level of Federal Government services, of which the proposed national pension plan and medicare are representative, would indicate the probability that Federal Government office space will increase per capita in the years ahead. Our projections of Federal Government office space requirements in the table following reflect this probability with a steadily increasing per capita factor.





Halifax CMA

Additional Cumulative Federal Government  
Office Space Requirements 1966-1986

	<u>1966</u>	<u>1971</u>	<u>1976</u>	<u>1981</u>	<u>1986</u>
Population	205,500	229,500	257,500	290,000	326,000
Federal Government Office Space Per Capita	2.0	2.2	2.4	2.6	2.8
Space Requirements (Sq.Ft.)	411,000	504,900	618,000	754,000	912,800
Less 1964 inventory*	<u>397,000</u>	<u>397,000</u>	<u>397,000</u>	<u>397,000</u>	<u>397,000</u>
Cumulative Requirements (Sq.Ft.)	<u>14,000</u>	<u>107,900</u>	<u>221,000</u>	<u>357,000</u>	<u>515,800</u>

\* Includes Sir John Thompson Building.

At the Provincial Government level, space needs have also been rising to accommodate expanding office staff and facilities. The Provincial Government offices which are located in the Provincial Building, the Johnston Building, and in a building on Brunswick Street are currently fully occupied so that there is no room for expansion within present facilities.

Provincial Government office space requirements in Halifax have been increasing at a rate of as much as 4.8% per year of the inventory (10,800 square feet per year on an inventory of 225,000 square feet), and we would anticipate that this rate will continue on the increasing inventory in the future as the administration expands to serve a growing provincial population. In the table below, Provincial Government office space requirements are projected to 1986 with the average annual rate of increase of 4.8% being applied to the projected inventory in each five-year period.

Halifax CMA

Additional Cumulative Provincial Government  
Office Space Requirements 1966-1986

	<u>1966</u>	<u>1971</u>	<u>1976</u>	<u>1981</u>	<u>1986</u>
Average Annual Rate of Increase	4.8%	4.8%	4.8%	4.8%	4.8%
Estimated Total Space (Sq.Ft.)	246,600	305,600	378,900	469,900	582,700
Less 1964 Inventory	<u>225,000</u>	<u>225,000</u>	<u>225,000</u>	<u>225,000</u>	<u>225,000</u>
Estimated Additional Space (Sq.Ft.)	<u>21,600</u>	<u>80,600</u>	<u>153,900</u>	<u>244,900</u>	<u>357,700</u>





HALIFAX CMA

TOTAL ADDITIONAL CUMULATIVE GOVERNMENT  
OFFICE SPACE REQUIREMENTS 1966 - 1986

	<u>1966</u>	<u>1971</u>	<u>1976</u>	<u>1981</u>	<u>1986</u>
Federal Government	14,000	107,900	221,000	357,000	515,800
Provincial Government	21,600	80,600	153,900	244,900	357,700
Local Government	<u>25,700</u>	<u>44,900</u>	<u>67,300</u>	<u>93,300</u>	<u>122,100</u>
TOTAL	<u>61,300</u>	<u>233,400</u>	<u>442,200</u>	<u>695,200</u>	<u>995,600</u>

It may be noted that the estimated office space for the Provincial Government in 1986 of approximately 583,000 square feet amounts to 1.79 square feet per capita against an estimated 1986 Halifax CMA population of 326,000. This increase from the present 1.2 square feet per capita would appear to be reasonable having regard to the increasing role of government in the administration of our day-to-day affairs.

At the local government level, the Draft Master Plan indicates that the City of Halifax requires a total of 104,000 square feet of office space to provide adequate accommodation for its staff against a current inventory of 78,700 square feet. While a new city hall has recently been constructed in the City of Dartmouth, the City of Halifax city hall which was constructed in 1890 is very evidently not providing adequate accommodation for the present city administration. Our projections for local government office space which are set out in the table following assume that the present ratio of .8 square feet per capita will be maintained during the period covered by our projections. It may be noted that the 25,700 square feet projected as a requirement for additional space in 1966 approximate the additional amount of space currently required to adequately house the City of Halifax administration.

#### HALIFAX CMA

##### ADDITIONAL CUMULATIVE LOCAL GOVERNMENT OFFICE SPACE REQUIREMENTS 1966-1986

	<u>1966</u>	<u>1971</u>	<u>1976</u>	<u>1981</u>	<u>1986</u>
Population	205,500	229,500	257,500	290,000	326,000
Sq. Ft. Per Capita	.8	.8	.8	.8	.8
Total Sq. Ft.	164,400	183,600	206,000	232,000	260,800
Less 1964 Inventory	<u>138,700</u>	<u>138,700</u>	<u>138,700</u>	<u>138,700</u>	<u>138,700</u>
Cumulative Requirements	<u>25,700</u>	<u>44,900</u>	<u>67,300</u>	<u>93,300</u>	<u>122,100</u>

In the table on the opposite page, the projected space requirements for the various levels of government are brought together and totalled. It may be seen that in 1966 total government office space requirements will be in the neighbourhood of 61,300 square feet and that this figure will rise cumulatively to 995,600 square feet by 1986.







**HALIFAX -  
DARTMOUTH**







# HALIFAX - DARTMOUTH

Harbour

Halifax

HALIFAX

DARTMOUTH

HALIFAX CMA  
MAJOR OFFICE DEVELOPMENTS

1 MILE

George Island

POINT BEACON PARK

Northwest

The Narrows

on Park  
ay)

ASHBURN  
GOVE CHURCH



### Halifax CBD Office Space Requirements

In the table below, total CMA office space projections are set out together with the estimated 1964 Halifax CMA inventory:

#### Halifax CMA

#### Office Space Inventory and Additional Space Requirements\* (Sq.Ft.)

	<u>1964</u>	<u>1966</u>	<u>1971</u>	<u>1976</u>	<u>1981</u>	<u>1986</u>
a. Medical/Dental	202,500	21,700	47,950	78,800	114,000	153,000
b. Nongovernment	1,485,000	169,000	361,000	714,000	990,000	1,459,000
c. Government	<u>695,700**</u>	<u>61,300</u>	<u>233,400</u>	<u>442,200</u>	<u>695,200</u>	<u>995,600</u>
TOTAL	<u>2,373,200</u>	<u>252,000</u>	<u>642,350</u>	<u>1,235,000</u>	<u>1,799,200</u>	<u>2,607,600</u>

\* 1964 existing inventory; 1966-1986 projected requirements.

\*\* Does not include Sir John Thomson building.

As was pointed out in the previous section, all of the major Halifax CMA office space is located within the Halifax CBD and the Spring Garden Road area.

A number of recent office developments have taken place within the Halifax CMA. The following buildings are either under construction or plans for their construction have been announced (see map opposite):

		<u>Approximate Area</u> (Sq. Ft.)	<u>Location</u>
1. Sir John Thomson	- Government	65,000	CBD
2. One Sackville Place	- Private	42,000	CBD Core
3. Centennial Building	- Private	75,000	CBD Core
4. Lord Nelson office extension	- Private	80,000	Non-CBD
5. Portland Street, Dartmouth	- Private	30,000	Dartmouth
6. Willow Tree development	- Private	50,000	Non-CBD
7. Spring Garden and Brenton	- Private	<u>85,000</u>	Non-CBD
TOTAL		<u>427,000</u>	

It is interesting to note that only 117,000 square feet of the new office construction is located within the core of the CBD, and only 182,000 square feet is within the CBD at all.





ADDITIONAL CBD OFFICE SPACE  
REQUIREMENTS (CUMULATIVE)  
1966 - 1986  
(Sq. Ft.)

	<u>% of CMA Requirements</u>	<u>1966</u>	<u>1971</u>	<u>1976</u>	<u>1981</u>	<u>1986</u>
Medical/Dental	10%	2,170	4,795	7,880	11,400	15,300
Nongovernment	80%	135,000	289,000	571,000	792,000	1,167,000
Government	90%	<u>55,100</u>	<u>210,000</u>	<u>398,000</u>	<u>626,000</u>	<u>896,000</u>
TOTAL		<u>192,270</u>	<u>503,795</u>	<u>976,880</u>	<u>1,429,400</u>	<u>2,078,300</u>

It should, perhaps, be anticipated that medical/dental office space will continue to be developed in the Quinpool Road/Robie area and that, because of the concentration of medical facilities west of the South Park Street, there will be little incentive for development of major CBD medical/dental space. We have, therefore, projected only 10% of the new medical/dental office space for the Halifax CBD.

In nongovernment office space, existing and planned developments can be expected to put more new space onto the market than has been available at any time in recent years. Nevertheless, because of the lack of modern office facilities, a considerable market exists within the Halifax area for new office space to meet the needs of tenants who are currently occupying obsolete space. There are no indications that new office developments will have any major problem in leasing the additional space that will be made available. The relatively small amount of new space actually going into the CBD would indicate that further opportunity for CBD nongovernment office space exists. Because of the present concentration of nongovernment office space within the CBD, the area can be expected to attract a major portion of future developments, and this will be particularly true if the master plan for the CBD reflects the confidence which the city administration has in the future of the area. For planning purposes, we have projected the CBD share of nongovernment office development at 80% of the CMA requirements, although it should be appreciated that, without downtown redevelopment, there will be an increasing tendency for new nongovernment office space to locate outside the CBD.

Insofar as government office space is concerned, every effort should be made to concentrate further government office space developments within the core of the CBD. This source alone, if dilution can be prevented, represents a potential increase of approximately 1,000,000 square feet of new office space which could be located in the CBD within the next 20 years.

In the table on the opposite page, we have calculated Halifax CBD additional office space requirements assuming that the area will attract 10% of the new medical/dental space, 80% of the new nongovernment office space, and 90% of the new government space during the period covered by our projections. On this basis, approximately 2,000,000 additional square feet of office space may be required within the Halifax CBD between 1966 and 1986.



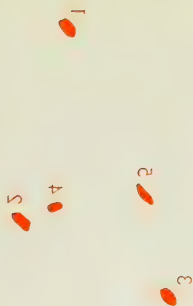




# HALIFAX - DARTMOUTH



MAJOR TRANSIENT HOUSING  
HAGLEAX CWA



# HALIFAX - DARTMOUTH



HALIFAX CMA  
MAJOR TRANSIENT HOUSING



## SECTION IV

### TRANSIENT HOUSING

#### Introduction

In the following section of this report an examination will be made of Halifax CMA transient housing facilities with particular reference to those facilities which (on the basis of the level of amenities supplied) offer first-class competitive accommodation. An assessment will then be made of the additional transient housing accommodation required in the Halifax CMA based upon the prospects for growth in the various sources of transient housing demand. Having estimated the probable additional transient housing requirements for the Halifax CMA, the current position of the City of Halifax CBD will be discussed and projections of Halifax CBD additional transient housing requirements will be made.

#### Halifax CMA Transient Housing Facilities

The Halifax CMA contains five major hotels or motor hotels with a sixth currently under construction, as well as a wide range of lower priced accommodation within the city limits of Halifax and Dartmouth. In addition, a considerable quantity of motel accommodation is available at highway locations outside the city limits. The map on the opposite page indicates the location of the major transient housing facilities, details of which are as follows:

1. The Nova Scotian Hotel - This hotel which is part of the C.N.R. chain was originally constructed on its present site in 1930. In 1960/61 a new wing was added containing 180 rooms to bring the hotel up to its present complement of 325 rooms.
2. The Lord Nelson Hotel - This hotel while older than the other major downtown Halifax facilities (excluding the original portion of the Nova Scotian Hotel) offers good competitive accommodation. It is the second largest of the Halifax CMA hotels with 175 rooms and is well located at the western end of the Spring Garden Road Development. Recent additions to the hotel have provided a retail shopping arcade, office space, and enlarged banquet room facilities. Plans are currently underway to expand the office portion of the addition.
3. The Citadel Inn - This motor hotel, which is part of the Seaway Hotel chain, was opened during 1964. It is conveniently located some five blocks from the Grand Parade. The Citadel Inn contains 94 rooms and is the only downtown Halifax transient accommodation with a swimming pool.



4. The Dresden Arms Motor Hotel - This unit was opened in February of 1963. It currently contains 63 rooms although an extension which will add a further 30 rooms is currently underway.
5. The Carleton Hotel - The Carleton Hotel is in the heart of the Halifax central business district. Although its accommodation is somewhat older and less expensive than that of the other facilities listed above, it is probably the most important of the remaining transient housing facilities. The Carleton Hotel contains 77 rooms although not all of those have private bathroom facilities.
6. Holiday Inn (Dartmouth) - This unit which is currently under construction at the exit from the Angus L. MacDonald bridge on the Dartmouth side of the harbour will contain 120 rooms and will provide the City of Dartmouth with its first modern major hotel accommodation.

The Halifax CMA will contain some 807 first-class competitive hotel and motor hotel rooms when the Holiday Inn and the Dresden Arms extension are completed. Of this total, 307 rooms will have been constructed since 1961. In addition, motels in suburban areas contain a total of approximately 240 first-class competitive units. Total competitive transient housing accommodation in the Halifax CMA will therefore be in the neighbourhood of 1,047 rooms when the Dresden Arms and Holiday Inn are completed.

A review of the major competitive hotel and motor hotel space currently available would indicate that occupancy rates have generally been maintained at 60% to 65% with peak demand occurring during the summer months and during conventions. The hotel operators who were interviewed were generally reluctant to disclose occupancy rates, and the figure which we have quoted (which is based upon our interviews) may be somewhat conservative. The fact that the Dresden Arms is expanding and that the Holiday Inn is being built is an indication that the market for competitive facilities is not oversubscribed at the present time.

#### Sources of Transient Housing Demand

Demand from a variety of sources underlies the Halifax CMA transient housing market and has provided a basis for additional hotel and motor hotel construction. The larger segments of demand are as follows:

1. Meetings & Conventions. The annual reports of the Halifax tourist and convention bureau indicate that the recent history of conventions in the Halifax area has been as follows:





	<u>No. of Conventions</u>	<u>No. of Delegates</u>
1962	37	10,500
1963	35	8,700
1964	58	10,740
1965*	29	11,500

\* Number of conventions and delegates confirmed at the time the 1964 report was prepared.

The larger conventions like the Shriners (3,500 delegates expected), The Canadian Medical and Bar Associations and the Canadian Legion have taxed the area's transient housing accommodation to the limit, and while local authorities see a continuing increase in convention traffic the existing facilities do not make the Halifax CMA particularly attractive to the larger convention groups. Given an expansion of accommodation and convention facilities and a continuation of the present policy of promoting the Halifax area as a convention site, it is reasonable to anticipate steady growth in convention traffic. The Atlantic Winter Fair which was held in Halifax for the first time in 1963 is an example of the type of nonconvention event which is capable of attracting a substantial number of visitors to the area during what is normally a period of light demand for transient housing accommodation.

2. Business Travelers. In 1961, labour force of the Halifax CMA was reported at 72,953 and this number is projected to increase to approximately 129,400 by 1986. The Halifax CMA as a regional centre for government, business and administration plays many roles tending to increase both the incidence of business-connected travel and the need for transient housing accommodation. Assuming that the area will maintain its regional influence in this respect, it should be anticipated that this source of demand for transient accommodation will increase steadily as the region grows.

3. Tourists. The 1964 Tourist Convention Report lists the following registrations for the years 1962 to 1964:

<u>Year</u>	<u>Registrations</u>
1962	23,463
1963	24,849
1964	36,591

During discussions with the director of the Tourist and Convention Bureau, it was stressed that spot checks indicate that less than 20% of the visitors to the area register with the bureau. This being so, tourist traffic in 1964 was estimated at a minimum of 183,000. While a percentage of the tourists and visitors to the area is enroute to a destination





HALIFAX CMA

TRANSIENT HOUSING DEMAND 1966 - 1986  
(cumulative no. of additional rooms)

	<u>1966</u>	<u>1971</u>	<u>1976</u>	<u>1981</u>	<u>1986</u>
Population	205,500	229,500	257,500	290,000	326,000
Rooms per 1,000	6.0	6.5	7.0	7.5	8.0
Total	1,233	1,492	1,802	2,175	2,608
Inventory 1965	<u>1,047</u>	<u>1,047</u>	<u>1,047</u>	<u>1,047</u>	<u>1,047</u>
Additional rooms (cumulative)	<u>186</u>	<u>445</u>	<u>755</u>	<u>1,128</u>	<u>1,561</u>

other than Halifax and stays overnight in motel accommodation outside the city limits, the City of Halifax itself has much of historical significance to attract visitors to the downtown area. The relative proximity of Halifax to the densely populated areas of the United States' Eastern Seaboard and the general and continuing improvement in highways should result in substantial and continuing increases in tourist traffic. Redevelopment of the Halifax CBD including the construction of adequate museum and other facilities will, of course, improve the ability of the area to attract an increasing share of the tourist traffic.

#### Transient Housing Requirements

As was pointed out earlier, first-class competitive transient housing accommodation in the Halifax CMA in 1966 will total approximately 1,047 rooms. Against a projected 1966 population of 205,500, the room-to-population ratio will be 5.1 rooms per 1,000 of population. Our experience in other areas would indicate that the ratio could be increased to between six and eight rooms per thousand of population in future years. At present transient housing operating levels, an increase in rooms per 1,000 of population would result in a drop in occupancy levels; however, increasing per capita incomes and leisure time may be expected to increase travel and the use of transient housing facilities in future years. More-over development of additional facilities should attract increased convention and transient traffic to the area. We would therefore anticipate that, despite a gradual increase in room ratios, occupancy levels should remain relatively stable.

The table on the opposite page projects transient housing demand at a room-to population ratio which rises from 6 rooms per thousand in 1966 to 8 rooms per thousand in 1986. The projected demand for additional transient housing accommodation within the Halifax CMA rises as a result of increasing population and room ratios from 186 rooms in 1966 to 1,561 in 1986.

#### Halifax CBD Transient Housing Requirements

The Halifax CBD has maintained a strongly dominant position with respect to transient housing accommodation. With the exception of the Holiday Inn development, all major hotels and motor hotels are located either within or on the fringe of the CBD. Of the 1,047 first-class competitive transient housing rooms which will be available within the Halifax CMA in 1966, approximately 77% will be located within the Halifax CBD and Spring Garden Road area, with the balance being accounted for by the Holiday Inn in Dartmouth and suburban motel accommodation.

While there will continue to be a demand for suburban transient housing facilities to accommodate those who have no reason to venture into the downtown area, it is reasonable to assume that, because of the absolute dominance of the Halifax CBD with respect to government, business and administration facilities, most of the demand for transient housing accommodation will continue to be focused on the downtown area of the City of Halifax.







HALIFAX CBD

Estimated Cumulative Share of Additional Halifax CMA  
Transient Housing Accommodation 1966 - 1986  
(No. of rooms)

	<u>1966</u>	<u>1971</u>	<u>1976</u>	<u>1981</u>	<u>1986</u>
Halifax CMA Transient Housing Demand	186	445	755	1,128	1,561
Halifax CBD Percentage Share	77%	75%	70%	65%	60%
Halifax CBD No. of Additional Rooms	143	334	528	733	937

Because of the extent to which Halifax CMA growth, and in particular industrial growth, is expected to occur in Dartmouth and the suburbs rather than the City of Halifax itself, it would be our opinion that, while the downtown area of the City of Halifax may be expected to maintain its dominance in transient housing accommodation, the demand for additional Halifax CBD transient housing facilities will slacken somewhat during the period covered by our projections as additional demand is created in Dartmouth and the suburbs.

The table on the opposite page shows the estimated cumulative share of additional Halifax CMA transient housing facilities which we have projected for the Halifax CBD. It may be noted that, while the share of estimated additional transient housing requirements is projected to drop from 77% in 1966 to 60% in 1986, the net effect of this reduction will be to reduce the Halifax CBD share of CMA transient housing from 77% to 67%.



## SECTION V

### OTHER LAND USES

#### Introduction

In the following section of the report estimates are made of the future requirements for recreational and institutional (public and semi-public) land uses and for Halifax CBD automobile parking requirements.

In the recreational and institutional land-use classifications, certain uses have particular relevance in an analysis related to the CBD, while other land uses are, for one reason or another, not normally associated with the downtown area. Each of the land-use classifications will be dealt with in turn and in each case, having identified the particular land uses which should be considered for inclusion within the Halifax CBD, the various identified land uses will be discussed and, to the extent that projections are practical or possible, projections of Halifax CMA and CBD space or unit requirements will be made. In the final part of this section, Halifax CBD automobile parking requirements will be examined and recommendations made with respect to the need for additional parking facilities.

#### Recreational Land Uses

Within this general land-use classification are a wide variety of commercial and noncommercial activities, ranging from parks, playgrounds and tot lots, through private clubs, dance halls, billiard parlours and movie cinemas, to riding academies, golf courses and yacht clubs. While this list is by no means exhaustive, it serves to indicate the extremely wide range of activities which come within the general classification. Many of the recreational activities like riding academies, yacht clubs and golf courses are clearly not pertinent to a discussion of Halifax CBD land-use requirements, while other activities like private social clubs, parks and playgrounds are impossible to project on the basis of economic demand.

Under the circumstances, our attention has been directed towards those land uses of a commercial recreational nature which have relevance to the Halifax CBD and which can be analyzed and projected from an economic standpoint. This approach assumes, of course, that the planners will adjust our projections of recreational requirements to include such additional space as may in their opinion be required to provide adequate park, playground and other recreational space. The DBS Census report for 1961 indicates that the following commercial recreational facilities were available within the Halifax CMA in that year:

Theatres	- 9
Bowling Alleys	- 9
Billiard Parlours	- 5





HALIFAX CMA  
COMMERCIAL AMUSEMENT AND RECREATION 1966-1986

PER CAPITA SALES

	<u>1961</u>	<u>1966</u>	<u>1971</u>	<u>1976</u>	<u>1981</u>	<u>1986</u>
Theatres	\$5.31	\$5.56	\$5.81	\$6.06	\$6.31	\$6.56
Bowling	3.56	3.76	3.96	4.16	4.36	4.56
Billiards	<u>.37</u>	<u>.39</u>	<u>.41</u>	<u>.43</u>	<u>.45</u>	<u>.47</u>
Total	<u>\$9.24</u>	<u>\$9.71</u>	<u>\$10.18</u>	<u>\$10.65</u>	<u>\$11.12</u>	<u>\$11.59</u>

TOTAL SALES 1966-1986  
(\$'000's)

	<u>1961</u>	<u>1966</u>	<u>1971</u>	<u>1976</u>	<u>1981</u>	<u>1986</u>
Population	183,946	205,500	229,500	257,500	290,000	326,000
Theatres	\$976.2	\$1,142.6	\$1,333.4	\$1,560.5	\$1,829.9	\$2,138.6
Bowling	654.2	772.7	908.8	1,071.2	1,264.4	1,486.6
Billiards	<u>68.1</u>	<u>80.1</u>	<u>94.1</u>	<u>110.7</u>	<u>130.5</u>	<u>153.2</u>
Total	<u>\$1,698.5</u>	<u>\$1,995.4</u>	<u>\$2,336.3</u>	<u>\$2,742.4</u>	<u>\$3,224.8</u>	<u>\$3,778.4</u>

PROJECTED SALES INCREASES - OVER 1961  
(\$'000's)

	<u>1966</u>	<u>1971</u>	<u>1976</u>	<u>1981</u>	<u>1986</u>
Theatres	\$166.4	\$357.2	\$ 584.3	\$ 853.7	\$1,162.4
Bowling	118.5	254.6	417.0	610.2	832.4
Billiards	<u>12.0</u>	<u>26.0</u>	<u>42.6</u>	<u>62.4</u>	<u>85.1</u>
Total	<u>\$296.9</u>	<u>\$637.8</u>	<u>\$1,043.9</u>	<u>\$1,526.3</u>	<u>\$2,079.9</u>

PROJECTED CUMULATIVE UNIT REQUIREMENTS

	<u>Av. Sales Per Unit</u>	<u>1966</u>	<u>1971</u>	<u>1976</u>	<u>1981</u>	<u>1986</u>
Theatres	\$108,500	1	3	5	7	10
Bowling	72,700	1	3	5	8	11
Billiards	13,600	<u>-</u>	<u>1</u>	<u>3</u>	<u>4</u>	<u>6</u>
Total		<u>2</u>	<u>7</u>	<u>13</u>	<u>19</u>	<u>27</u>

In addition, one dance hall, the amusement concession on Barrington Street, four "athletic clubs, arenas, stadiums and grounds" were also reported for the Halifax CMA.

Because of DBS policy with respect to withholding information wherever it will result in disclosure of individual operations, business receipt statistics are only available for theatres, bowling alleys and billiard parlours. Receipts for these activities were reported as follows:

Halifax CMA  
Commercial Amusement and Recreation  
Total and Per Capita Sales 1961

	<u>Receipts</u>	<u>Per Capita Sales</u>	<u>Selected Cities Average</u>
Theatre	\$976,200	\$5.31	\$5.00
Bowling Alleys	654,200	3.56	2.36
Billiard Parlours	68,100	.37	.58
		<u>\$9.24</u>	<u>\$7.94</u>

For comparison purposes, the average per capita sales for the cities of London, Kitchener and Calgary are shown in the third column of the above table. On the basis of receipts reported for 1961, the average per unit operating levels would be as follows:

	<u>Sales Per Unit</u>
Theatres (9)	\$ 108,467
Bowling Alleys (9)	72,689
Billiard Parlours (5)	13,620

Assuming a continuation of the current pattern of commercial recreational expenditures, the tables opposite project a steadily rising volume of per capita sales to reflect anticipated increases in both disposable income and leisure time. Per capita sales by type of recreational facility are then converted to total sales expressed in gross terms, and then as an increase over 1961 sales. By applying average per unit sales to the increases over 1961, the cumulative maximum number of additional commercial recreational units has been estimated. It should be stressed that the unit requirements are maximum numbers at existing operating levels, and do not reflect the ability of existing facilities to absorb increased business. The numbers do not therefore necessarily indicate the actual number of additional unit requirements. In addition to these commercial units for which DBS statistics are available, the Halifax CMA is currently supporting live theatre at the 525-seat Neptune Theatre while noncommercial recreational facilities within the CMA include four curling clubs.





## Halifax CBD Commercial Recreational Requirements

Present Halifax CBD facilities include the Neptune live theatre, the Capitol and Paramount movie theatres, a billiard parlour, and the amusement arcade on Barrington Street. As was pointed out in the Halifax CBD Draft Master Plan, the number of movie theatres within the CBD declined from five to two during the previous eight years.

While the movie theatre industry has experienced some improvement in business in recent years, new facilities which have been constructed have generally been located in the suburbs to take advantage of local population concentrations, rather than in downtown areas. Despite the dilution of movie theatre facilities which has resulted from suburban development, the main concentration of facilities has tended to remain in the downtown area. The closing of three movie theatres in the Halifax CBD since 1956 has weakened the position of the CBD as a recreational centre for the region. While the loss of these facilities has been somewhat offset by the opening of the Neptune Theatre, it is in our opinion important that further strengthening of commercial recreational facilities be encouraged within the Halifax CBD. Since billiard and bowling facilities are particularly suited to suburban locations, additional CBD commercial recreational strength must logically come from additional movie theatre facilities. The tables opposite the previous page indicate a steadily growing potential for movie theatre recreational facilities. While continued growth of suburban facilities should be anticipated, it would be our opinion that a redevelopment plan for the Halifax CBD should make provision for three additional movie theatres in the CBD during the period covered by our projections.

## Institutional Land Uses

Public and semi-public institutional land uses are as follows:

### Public

Government House  
Provincial Legislature  
City and County Jail  
Courthouse and Land Registry  
Libraries and Art Galleries  
Museums  
Dept. of National Defence Lands  
Civic Auditorium

### Semi-Public

Schools  
Universities  
Hospitals  
Churches  
Cemeteries

Institutional land uses occupy widely varying portions of various cities which have been surveyed in the United States. In his book, Land Uses in American Cities, Harland Bartholomew examined 53 major (central) cities and indicated that an average of almost 11% of the developed areas



was utilized for institutional purposes. Institutional uses range from a minimum of 2% to a maximum of 54% of developed area in the 53 cities examined. This wide range is indicative of the problem of establishing normal ratios of institutional land to total city area or institutional land to population.

Like recreational land uses, there are a number of institutional land uses which are either not suitable for inclusion in the Halifax CBD or are already firmly established in other areas of the Halifax CMA. This would be true of the county jail, the Department of National Defence lands, facilities for higher education (including the Nova Scotia Technical College) and hospitals. Of the balance of the land uses included within this category, while we can make general recommendations with respect to their suitability as a CBD land use, actual space projections from an economic standpoint are impractical unless a separate and intensive study has been made.

#### Public Land Uses

While Government House and the Provincial Legislature may be expected to adequately serve future needs during the period covered by our projections, new courthouse and land registry facilities are urgently required. The present courthouse and land registry building (with jail facilities in the basement) is located on the fringe of the Halifax CBD, on Spring Garden Road. Because of the concentration of lawyers within the CBD itself, the courthouse and land registry could conveniently be located within the core of the Halifax CBD, providing a suitable site could be secured. In the event that a suitable location is not available within the core of the CBD, it would be our opinion that new courthouse facilities should be located in some other area of the CBD convenient to the concentration of lawyers' offices and to the offices of the various levels of Government.

While the Memorial Library at the corner of Spring Garden Road and Grafton Street will probably be adequate to serve Halifax CBD requirements during the period to 1986, there is an immediate need for museum facilities both for the Maritime museum, which is currently in temporary quarters, and the Centennial aquarium. In addition, thought should be given to a future location for an art gallery to serve the cultural needs of the regional population. Both the museum and the possible art gallery will fulfill regional rather than local needs and should logically be located within the Halifax CBD. Similarly, development of a civic auditorium for symphony concerts and related activities of regional significance may be practicable within the near future. Location of such a facility within the Halifax CBD would strengthen the regional role of the CBD and provide additional balance to the variety of CBD land uses.

Development of the public institutional land uses which we have referred to, as well as construction of a new Halifax City Hall, provide a major opportunity



for planners, by careful grouping and choice of locations, to balance and create diversity of land uses in the area adjacent to the CBD core.

### Semi-Public Land Uses

We would not anticipate significant change in CBD semi-public land uses during the period to 1986. University and hospital facilities are well established in other areas within the Halifax CMA, while the churches and cemetery located within the Halifax CBD are unlikely to expand. On the other hand, because of the historical significance, it is unlikely that the CBD churches or the cemetery will be converted to other uses.

While it is improbable that additional schools will be required in the central portion of the Halifax CBD, additional educational facilities might be required at the northern or southern extremities of the CBD if neighbouring schools are unable to absorb the additional children which might result from an increase in CBD population, or if the school presently occupying land between Blowers Street and Spring Garden Road, west of Barrington Street, is relocated in a less central CBD location.

### Parking

The 1964 inventory of automobile parking spaces, as set out in the Draft Master Plan, is as follows:

<u>Parking Areas</u>	<u>Total CBD</u>	<u>Core CBD</u>
<u>On-Street Parking</u>		
Meters	464	197
Free Unrestricted	250	-
Free Limited Parking	<u>173</u>	<u>19</u>
Subtotal	887	216*
<u>Off-Street Parking</u>		
City Permanent	90	-
City Uncleared Land	350	-
Private Rental or Restricted	<u>1,940</u>	<u>267</u>
Subtotal	2,380	267
<u>Parking Garages</u>		
Argyle	225	-
Tex Park	<u>300</u>	<u>300</u>
Subtotal	525	300
TOTAL	<u><u>3,792</u></u>	<u><u>783*</u></u>

\* Numbers corrected.



As was pointed out in the Draft Master Plan, perhaps as many as 1,690 of the parking spaces currently available will be eliminated by development of city controlled and privately owned lands which are currently used for parking and by the gradual elimination of on-street parking within the CBD, which would reduce the current inventory to approximately 2,100 parking spaces.

The Draft Master Plan gives a combined CBD office and retail inventory of approximately 2,853,600 square feet. The ratio of car parking spaces per 1,000 square feet of office and retail space for the Halifax CBD is, therefore, approximately .75 parking spaces per 1,000 square feet. At the same ratio, the additional 2,600,000 square feet of office and retail space which we have projected for the Halifax CBD during the period to 1986 would require an additional 3,470 parking spaces.

In fact, the ratio of car parking spaces per 1,000 square feet of office and retail space is low and would indicate that some parking deficiency currently exists in the Halifax CBD. While we would suggest the need for a detailed parking and transportation study, speaking in general terms, it is our experience that a more normal ratio would be 2 parking spaces per 1,000 square feet of CBD office and retail space.

At a ratio of 2 parking spaces per 1,000 square feet of space, the current parking inventory should be in the neighbourhood of 5,700 parking spaces, and our projected increases in retail and office space within the CBD would require provision of an additional 5,200 parking spaces within the CBD. Because of the difficulty of identifying at the present time the probable rate at which existing parking spaces will be withdrawn from use, the table below indicates estimated CBD parking requirements during the period covered by our projections without making allowance for replacement of existing facilities. The parking requirements which have been estimated for the CBD are designed to maintain a constant ratio of 2 parking spaces per 1,000 square feet of CBD office and retail space.

#### Halifax CBD 1966-1986

##### Cumulative Additional Parking Requirements

	<u>1966</u>	<u>1971</u>	<u>1976</u>	<u>1981</u>	<u>1986</u>
Cumulative Additional Parking Space Require- ments (No. of spaces)	2,437	3,263	4,457	5,659	7,297

It is noted that the Halifax/Dartmouth ferry, which has shown passenger increases in every month during the past sixteen months and carried a total of 1,171,264 passengers during 1964 (an increase of 33,000 over the previous year), does not have modern and attractive terminal facilities. Moreover, the public transit system (including intercity and suburban bus lines) does





not have terminal facilities in the Halifax CBD. While improvement of public transportation facilities cannot be expected to have a major impact on the volume of automobile traffic, consideration should be given to providing more attractive and convenient public transportation facilities within the Halifax CBD in order to encourage increased pedestrian traffic and to reduce to some degree the apparent Halifax CBD parking space requirements. Having regard to the probable population growth on the Dartmouth side of the harbour, a substantial improvement in Halifax/Dartmouth ferry facilities warrants special attention, particularly since the terminal facilities are conveniently located in the heart of the Halifax CBD.



## APPENDICES



APPENDIX A

RETAIL CUSTOMER SURVEYS







TABLE A-1

HALIFAX CONSUMER SURVEY

"Pardon me, we are conducting a survey for The City of Halifax to learn more about peoples' shopping habits. Would you mind answering a few questions?"

1. What method of transportation do you usually use when coming to the Halifax Shopping Centre? Car \_\_\_\_\_ Bus \_\_\_\_\_ Other \_\_\_\_\_

2. Are you a resident of metropolitan Halifax?

Yes ☐

a. What part of the Metropolitan area do you live in?

b. What are the street names of the intersection nearest your home? \_\_\_\_\_

No ☐

a. What is the name of the place where you live?  
\_\_\_\_\_

3. How often do you visit the Halifax Shopping Centre?

☐

Daily

☐

Once a week or more

☐

Twice a month or more

☐

Once a month

☐

Infrequently

☐

Never before

4. What type of stores do you usually make purchases at?

☐

Convenience (grocery, drugs, variety)

☐

Comparison (department stores, specialty, fashion)

5. Do you also shop in downtown Halifax?

6. How often?

7. What type of stores do you usually make purchases at in the downtown area?

☐

Convenience

☐

Comparison

## APPENDIX A

### RETAIL CUSTOMER SURVEYS

During March of 1965, Canadian Urban Economics Limited arranged for concurrent customer surveys to be conducted at the Halifax Shopping Centre and at selected retail stores on Barrington Street in the Halifax CBD. The surveys were taken on three consecutive days ending on a Saturday and were intended primarily to provide a general indication of the point of origin of customers.

#### Halifax Shopping Centre

The Halifax Shopping Centre customer survey was conducted by four students from Dalhousie University who were thoroughly briefed and supervised by a member of this office. The form of the questionnaire used in this survey is shown in Table A-1 opposite. On each of the three consecutive days on which the Halifax Shopping Centre customer survey was conducted, 100 questionnaires were completed to provide for a total survey of 300 customers. Of the 300 questionnaires completed, 15 were not usable for analytical purposes owing either to the fact that all questions had not been answered or that the customer's point of origin could not be traced.

The following tables present a summary of the information taken from the 285 completed questionnaires.





# POINT OF ORIGIN

	<u>Number</u>	<u>Percent</u>
Within Halifax CMA	257	90.0%
Outside Halifax CMA	28	10.0%
	<u>285</u>	<u>100.0%</u>
<u>Within Halifax CMA</u>		
City of Dartmouth	25	9.7%
Shearwater	1	0.4
Bedford-Waverly	14	5.5
City of Halifax	171	66.5
Western Suburbs (Rockingham, Armdale, etc.)	46	17.8
	<u>257</u>	<u>100.0%***</u>
<u>Within City of Halifax</u>		
Area "A" (North of Chebucto Road and North Street)	95	55.5%
Area "B" (Bounded by North Street to the North, Robie Street to the West, and by South Street to the South)	8	4.7
Area "C" (Bounded by Chebucto and North Streets in the North, Robie Street in the East, and South Street in the South)	56	32.8
Area "D" (South of South Street)	12	7.0
	<u>171</u>	<u>100.0%</u>

## HALIFAX SHOPPING CENTRE ANCILLARY INFORMATION

<u>Method of Transportation</u>		
Car	175	68.1%
Bus	55	21.4
Other	27	10.5
	<u>257</u>	<u>100.0%</u>
<u>Visits to Halifax Shopping Centre</u>		
Daily	19	7.4%
Once a Week or More	175	68.1
Twice a Month or More	41	16.0
Once a Month	14	5.4
Infrequently	7	2.7
Never Before	1	0.4
	<u>257</u>	<u>100.0%***</u>
<u>Type of Stores at Which Purchases Made</u>		
Convenience	90	32.7%
Comparison	185	67.3
	<u>275*</u>	<u>100.0%</u>

\* Does not add to sample size as some interviewees make purchases of both kinds.

\*\*\* May not add due to rounding. (A-2)

CITY OF HALIFAX  
ANCILLARY INFORMATION

	<u>Number</u>	<u>Percent</u>
<u>Also Shop in Downtown Halifax</u>		
Yes	162	63.0%
No	<u>95</u>	<u>37.0</u>
	257	100.0%
 Frequently	 41	 16.0%
Infrequently	121	47.0
Never	<u>95</u>	<u>37.0</u>
	257	100.0%
 <u>Type of Stores at Which Purchases Made</u>		
Convenience	26	16.0%
Comparison	<u>136</u>	<u>84.0</u>
	162*	100.0%

\* Does not add to sample size as some interviewees make purchases of both kinds.







TABLE B-1

DOWNTOWN CONSUMER SURVEY

"We are conducting a survey for the City of Halifax to learn more about peoples' shopping habits. Would you mind answering a few questions?"

1. Are you a resident of metropolitan Halifax?

- (Yes) a) What part of the metropolitan area do you live in? \_\_\_\_\_  
 b) What are the street names of the intersection nearest your home? \_\_\_\_\_

- (No) a) What is the name of the place where you live? \_\_\_\_\_

2. What method of transportation do you usually use to get downtown? (i.e. bus, car, pedestrian).

3. Do you work in the downtown area?

	Place of Residence	Method of Transportation	Work in Downtown
Example (	Flint & Adelaide - Fairview Connaught & Cork - Halifax	bus car	yes no
<u>THURSDAY</u>			
1			
2			
3			
4			
5			
<u>FRIDAY</u>			
1			
2			
3			
4			
5			
<u>SATURDAY</u>			
1			
2			
3			
4			
5			

Yell

### The Downtown Customer Survey

The retail facilities on Barrington Street are considerably less concentrated than those of the Halifax Shopping Centre. Moreover, it is difficult to identify the major retail customer traffic generators within the downtown area. Under the circumstances, it was decided that the downtown customer survey would be more effective if conducted by the downtown retail merchants themselves than if conducted by a limited number of interviewers stationed at sidewalk locations along Barrington Street.

The feasibility of conducting a downtown customer survey was discussed individually with the majority of the retail merchants on Barrington Street and the reaction from the merchants was generally enthusiastic.

The form of the questionnaire used in the downtown customer survey is shown in Table B-1 opposite. In order to ensure the success of the survey as far as possible, it was decided to limit the questionnaire to three simple questions:

1. Customer point of origin.
2. Method of transportation to the downtown.
3. Whether the customer worked in the downtown area.

The questionnaire was distributed to twenty merchants who had agreed to conduct the survey, and each was requested to interview five customers at random on each of the three consecutive days (during which the survey was to run concurrently with the customer survey being conducted at the Halifax Shopping Centre) in order to obtain a total survey of 300 customers.

Five of the downtown merchants (25% of the total group who had agreed to conduct the survey) returned blank questionnaire forms when the completed survey forms were picked up; and only 12 of the merchants (60% of the total group) completed the survey in every detail. Under the circumstances, the sample survey of downtown customers was reduced from 300 to 179. The following tables present a summary of the information taken from the completed questionnaires.



POINT OF ORIGIN

	<u>Number</u>	<u>Percent</u>
Within Halifax CMA	159	88.8%
Outside Halifax CMA	20	11.2
	<u>179</u>	<u>100.0%</u>
<u>Within Halifax CMA</u>		
City of Dartmouth	8	5.0%
Eastern Passage	1	0.6
Bedford-Waverly	4	2.5
City of Halifax	129	81.1
Western Suburbs (Rockingham, Armdale, etc.)	17	10.7
	<u>159</u>	<u>100.0%*</u>
<u>Within City of Halifax</u>		
Area "A" (North of Chebucto Road and North Street)	43	33.3%
Area "B" (Bounded by North Street to the North, Robie Street to the West, and by South Street to the South)	24	18.6
Area "C" (Bounded by Chebucto and North Streets in the North, Robie Street in the East, and South Street in the South)	32	24.8
Area "D" (South of South Street)	30	23.3
	<u>129</u>	<u>100.0%</u>

ANCILLARY INFORMATION

<u>Method of Transportation</u>		
Car	50	31.4%
Bus	94	59.1
Walk	14	8.8
Other	1	0.6
	<u>159</u>	<u>100.0%*</u>
<u>Place of Employment</u>		
Downtown Halifax	94	52.5%
Elsewhere	85	47.5
	<u>179</u>	<u>100.0%</u>

\* Percentage totals may not add due to rounding.



APPENDIX B

SUPPLEMENTARY TABLES



1961 LABOUR FORCE - MANUFACTURING  
HALIFAX AS A % OF LARGE AREAS

	Halifax City As a % of Halifax CMA*	Halifax CMA As a % of Nova Scotia	Halifax CMA As a % of Atlantic Provinces	Halifax CMA As a % of Canada
Manufacturing	49.5%	21.9%	9.6%	0.5%
Food & Beverages	66.4%	23.0%	9.3%	1.1%
Tobacco Products	-	25.0	5.0	*
Rubber Industries	60.0	20.0	11.4	0.1
Leather Industries	33.3	3.0	0.6	*
Textile Industries	47.1	5.5	2.7	0.1
Knitting Mills	-	0.1	0.1	*
Clothing Industries	60.6	26.8	13.6	0.1
Wood Industries	46.3	3.0	1.2	0.1
Furniture & Fixtures	46.2	9.7	6.0	0.1
Paper & Allied Industries	65.3	6.7	1.1	0.1
Printing & Publishing	59.3	47.5	23.6	1.0
Primary Metals	31.8	0.6	0.5	*
Metal Fabricating	45.0	15.8	7.9	0.3
Machinery	61.8	10.8	6.5	0.1
Transportation Equipment	32.1	43.7	25.0	1.6
Electrical Products	33.3	78.4	43.1	0.5
Nonmetallic Mineral Products	50.6	30.7	11.3	0.5
Petroleum & Coal Products	15.7	92.6	46.6	2.9
Chemical & Chemical Products	62.7	31.7	15.3	0.3
Miscellaneous	65.0	53.2	17.5	0.3

\* Census metropolitan area.

SOURCE: 1961 Census of Canada, Volume III, Part II.





# 1961 LABOUR FORCE % COMPOSITION - MANUFACTURING

	Halifax City	Halifax CMA*	Nova Scotia	Atlantic Provinces	Canada
Manufacturing	100.0%	100.0%	100.0%	100.0%	100.0%
Food & Beverages	43.8%	32.7%	31.2%	33.8%	15.6%
Tobacco Products	-	*	*	*	0.6
Rubber Industries	0.2	0.1	0.1	0.1	1.3
Leather Industries	*	*	0.3	0.6	2.4
Textile Industries	0.4	0.5	1.8	1.6	4.4
Spinning Mills	-	*	2.8	1.3	1.4
Clothing Industries	1.8	1.5	1.2	1.0	6.5
Wood Industries	1.5	1.6	11.8	13.1	7.0
Furniture & Fixture	0.5	0.5	1.2	0.8	2.5
Paper & Allied Industries	2.2	1.7	5.4	14.0	7.2
Printing & Publishing	13.5	11.3	5.2	4.6	6.0
Primary Metals	.2	0.3	11.6	5.4	6.4
Metal Fabricating	3.6	4.0	5.6	4.9	7.4
Machinery	0.6	0.5	0.9	0.7	3.6
Transportation Equipment	16.2	25.1	12.6	9.7	8.4
Electrical Products	3.7	5.5	1.5	1.2	6.0
Nonmetallic Mineral Products	3.4	3.3	2.4	2.8	3.4
Petroleum & Coal Products	2.1	6.7	1.6	1.4	1.2
Chemical & Chemical Products	3.4	2.7	1.9	1.7	4.9
Miscellaneous	2.8	2.1	0.9	1.2	3.6

\* Census metropolitan area.

SOURCE: 1961 Census of Canada, Volume III, Part II.



# 1961 LABOUR FORCE - MANUFACTURING

	Halifax City	Halifax CMA*	Nova Scotia	Atlantic Provinces	Canada
Manufacturing	3,699	7,472	34,081	77,771	1,404,865
Food & Beverages	1,622	2,442	10,626	26,280	219,185
Tobacco Products	-	1	4	20	8,833
Rubber Industries	6	10	50	88	18,844
Leather Industries	1	3	99	474	33,166
Textile Industries	16	34	616	1,278	62,252
Spinning Mills	-	1	963	1,032	19,746
Clothing Industries	66	109	407	799	91,928
Food Industries	56	121	4,032	10,208	98,871
Furniture & Fixture	18	39	401	647	35,696
Paper & Allied Industries	81	124	1,839	10,875	101,640
Printing & Publishing	500	843	1,776	3,578	84,265
Primary Metals	7	22	3,963	4,229	90,156
Metal Fabricating	135	300	1,901	3,792	103,216
Machinery	21	34	314	527	49,821
Transportation Equipment	601	1,875	4,292	7,507	118,021
Electrical Products	136	409	522	948	84,924
Nonmetallic Mineral Products	125	247	804	2,193	47,019
Petroleum & Coal Products	78	497	537	1,067	16,959
Chemical & Chemical Products	126	201	634	1,315	69,510
Miscellaneous	104	160	301	914	50,813

\* Census metropolitan area.

SOURCE: 1961 Census of Canada, Volume III, Part II.



	1951 Total Dwelling Units	1951 Apartments Inc. Duplexes	1951 % Apartments of Dwelling Units	1961 Total Dwelling Units	1961 Apartments Inc. Duplexes	1961 % Apartments of Dwelling Units
Calgary	40,235	15,250	37.9	78,396	22,132	28.2
Edmonton	46,395	13,390	28.9	89,003	21,692	24.4
Halifax	29,640	10,130	34.2	42,366	14,880	35.1
Hamilton	68,640	16,145	23.5	105,240	21,966	20.9
London	32,835	9,115	27.8	50,494	14,088	27.9
Montreal	334,705	280,470	83.8	549,652	383,735	69.8
St. John's	12,995	2,800	21.5	17,917	3,484	19.4
Toronto	273,200	60,340	22.1	482,490	128,680	26.7
					<u>Apartments Excl. Duplexes</u>	
Calgary				78,396	11,434	14.6
Edmonton				89,003	13,935	15.7
Halifax				42,366	8,977	21.2
Hamilton				105,240	12,634	12.0
London				50,494	8,026	15.9
Montreal				549,652	280,255	51.0
St. John's				17,917	1,931	10.8
Toronto				482,490	93,894	19.5

SOURCE: 1961 Census - Vol. 2.2-1, 1951 Census - Vol. 3

Note - In 1951 Duplexes include with apartments



APARTMENTS AS A PERCENTAGE OF TOTAL  
DWELLING STARTS SELECTED METROPOLITAN AREAS 1958 - 1964

	<u>1958</u>	<u>1959</u>	<u>1960</u>	<u>1961</u>	<u>1962</u>	<u>1963</u>	<u>1964</u>
Calgary	7.7%	11.9%	21.1%	26.0%	39.3%	39.1%	36.4%
Edmon ton	16.1%	17.7%	18.2%	33.8%	33.4%	37.4%	40.1%
Halifax	30.9%	19.7%	38.4%	30.5%	48.4%	65.2%	62.6%
Ham il ton	21.0%	38.4%	55.4%	37.8%	44.0%	46.1%	63.9%
London	24.1%	37.9%	44.0%	35.5%	51.7%	47.0%	53.8%
Montreal	72.6%	63.3%	57.9%	48.7%	47.0%	68.3%	69.8%
St. John's	0.8%	1.5%	2.4%	-	-	1.9%	-
Toron to	52.7%	55.7%	60.9%	66.8%	53.6%	55.4%	63.9%





LARRY SMITH & COMPANY

REPORT PREPARATION CHECK LIST

JOB NO. C5-122

Report Title City of Halifax Central Business District  
Economic Analysis for Re-development Planning

City/Area Halifax, Nova Scotia

Report Due Date June 30, 1965

Revision Dates \_\_\_\_\_

Production Supervisor Dick Hamilton

Report Writer John Green

Contact Representation Dick Hamilton/John Green

Typographic Accuracy Checked by Linda Sirr/ Date July 9, 1965

Statistical Presentation Checked By Anne Redpath Date July 7, 1965

Verbal Expression and Basic Judgments Checked By Derek Mason/Peter Arnott

Date July 8, 1965

Report Approved for Release to Client By Dick Hamilton/Larry Smith

Date July 6, 1965

Final Copies Assembled By Linda Sirr Date July 13, 1965





3 1761 11552040 5

